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What's the Future of Diesel Fuel Marketing?
How C-Stores Flex Their Buying-Power Muscles
California Wants to Stop Topping Off 'Gas' Tanks

NPN

National Petroleum News

C-Stores, C-Stores, C-Stores...

NPN
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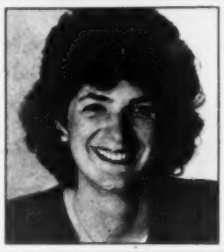

Editor's Viewpoint

Kudos for the Petroleum Marketers Assn. of America (PMAA), National Assn. of Convenience Stores (NACS) and Society of Independent Gasoline Marketers of America (SIGMA). These three national trade associations deserve a round of applause for diligently working side-by-side to help keep you in business.

At the urging of these associations, Rep. Mike Synar (D-OK) introduced much-needed legislation in Congress July 22, designed to thwart anti-competitive practices. This legislation would prohibit refiners from posting retail prices at their direct-operated locations below the prices charged to their wholesale customers—after adjusting for the cost of doing business. HR 2966 would also make it illegal for refiners to exercise price controls over their branded dealers through coercion, intimidation, etc.

It's not my intention to create any animosity with the major oil companies by implying that they want to force you out of business. I just believe that the "Petroleum Marketing Competition Enhancement Act" restores equity in the market by putting all retail operations on the same level playing field in the same geographic marketing area.

No one likes government to step in and regulate free enterprise. But let's face it, there appears to be some questionable pricing going on in the petroleum marketplace.

I've spoken with a few major oil company execs and I understand their reasoning for these price disparities. However, I must admit that the unusual price inversions seen since the invasion of Kuwait look like an attempt by some companies to exercise price controls. These actions are not only unfair, but they are forcing a number of marketers to reevaluate their future role in petroleum marketing. Some marketers are struggling on the brink of bankruptcy, while others have already tossed in the towel.

Therefore, barring voluntary efforts by some refiners to restore pricing equity in the marketplace, it looks like HR 2966 is the only option open to petroleum marketers.

I realize there will be some people who support my comments and others who will oppose them. We have an open forum for commentary here at *National Petroleum News* and I welcome your remarks, whatever your opinion is. I will print your views on our monthly Letters to the Editor page. I think it is only fair to give you the same opportunity to voice your opinions as I am free to voice mine.

—Peggy Smedley

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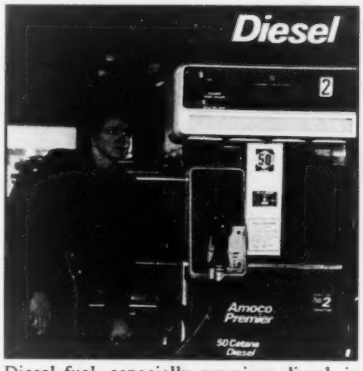

Diesel fuel, especially premium diesel, is undergoing a radical transformation, driven by new environmental regs.
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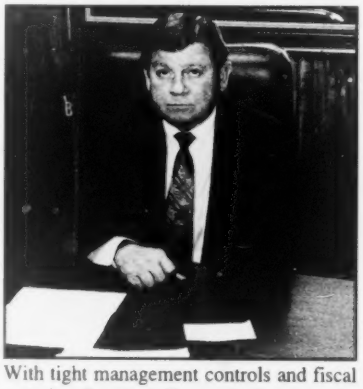

With tight management controls and fiscal restraint, Bennie J. Evans, Sr. has turned a small consignee operation into a big branded jobbership.
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Except for Exxon and a Few Lesser Lights, Second-Quarter Nets Were Sad

Almost everybody took it on the chin in the second quarter as a weak economy that was combined with depressed demand for oil products, slimmer margins on gasoline sales and tougher street competition to maintain volume hurt corporate and downstream profits alike.

Shell, for example, posted a second-quarter loss of $68-million, its first such quarterly decline since 1934. The loss also reflected a Shell write-off of $90-million in the second quarter to help pay for its recently announced decision to cut its employee roster by 10%. Arco recently announced it is joining the 10 percenters and is trimming its payroll accordingly. Chevron last year embarked on a cost-cutting campaign to reduce employee rosters by 10%.

Almost surprisingly, Exxon's second-quarter profits were up 2.3% and its domestic downstream net soared 49%. The few others with second-quarter pluses were Conoco, up 40%, Coastal, up 18.6%, Pennzoil, up 171% and Diamond Shamrock, up 3%. But percentages, as noted before, are deceiving. Exxon's 2.3% increase is worth more than $25-million, while Pennzoil's 171% entailed slightly more than $5-million.

Shell's Frank H. Richardson said that despite the second-quarter losses, "we are proceeding with the streamlining of our operations and have recently announced several actions designed to improve operating results." He said also that "we are closely monitoring our capital spending in order to make necessary timely adjustments if business conditions warrant."

Chevron chairman/CEO Kenn Derr blamed much of the poor second-quarter earnings on the company's refining and marketing operations. He said, "Our domestic downstream business basically broke even for the quarter whereas last year's quarter enjoyed unusually strong product sales margins."

Here They Are, In Black and White

(millions of dollars)

	2nd Q 1991	2nd Q 1990	% Chng.	6 Mos. 1991	6 Mos. 1990	% Chng.
Exxon	$1,125.0	$1,100.0	2.3	$3,365.0	$2,380.0	41.4
Mobil	445.0	498.0	(10.6)	1,150.0	898.0	28.6
Chevron	384.0	648.0	(40.7)	941.0	1,121.0	(16.1)
Amoco	238.0	379.0	(37.2)	1,041.0	845.0	23.2
Shell	(68.0)	161.0	--	57.0	363.0	(84.3)
Texaco	269.0	353.0	(23.8)	684.0	681.0	0.4
Arco	246.0	391.0	(58.9)	597.0	983.0	(39.3)
BP America	426.0	559.0	(23.8)	1,077.0	1,211.0	(16.6)
Phillips	16.0	105.0	(84.8)	176.0	364.0	(51.6)
Conoco	229.0	166.0	37.9	551.0	363.0	51.8
Marathon	64.0	128.0	(50.0)	135.0	210.0	(35.7)
Unocal	5.0	165.0	(97.0)	80.0	242.0	(66.9)
Coastal	26.2	22.1	18.6	80.5	97.7	(17.6)
Amerada Hess	67.7	(72.1)	--	143.4	(32.5)	--
Sun	43.0	115.0	(62.6)	84.0	186.0	(54.4)
Pennzoil	13.0	4.8	(170.8)	34.9	37.4	(6.7)
Ashland *	66.7	100.0	(33.3)	82.5	122.9	32.9
Kerr McGee	10.3	30.1	(65.8)	40.0	57.0	(29.8)
Fina	4.2	53.8	(92.2)	12.5	80.0	(84.4)
Citgo	64.0	109.0	(41.3)	153.0	156.0	(1.9)
Murphy	(105.1)	35.5	--	(79.5)	57.5	--
Total Petroleum	6.6	17.2	(61.6)	(4.1)	4.9	--
Diamond Shamrock	17.7	17.2	3.0	22.0	16.5	33.3
Crown Central	8.4	15.2	(44.7)	2.4	16.3	(85.9)

** Third quarter, fiscal ends 9/30.*

Downstream, the Nets Were Just as Sorry Looking

(millions of dollars)

	2nd Q 1991	2nd Q 1990	% Chng.	6 Mos. 1991	6 Mos. 1990	% Chng.
Exxon (Total)	$532.0	$574.0	(7)	$1,885.0	$765.0	146
Domestic	113.0	76.0	49	369.0	48.0	668
Foreign	419.0	498.0	(16)	1,516.0	717.0	111
Mobil (Total)	279.0	278.0	--	721.0	370.0	95
Domestic	65.0	58.0	12	165.0	97.0	70
Foreign	214.0	220.0	(3)	556.0	273.0	104
Chevron (Total)	50.0	448.0	(89)	283.0	608.0	(54)
Domestic	(16.0)	370.0	--	83.0	429.0	(81)
Foreign	66.0	78.0	(15)	200.0	149.0	34
Texaco (Total)	194.0	328.0	(41)	465.0	464.0	--
Domestic	65.0	171.0	(62)	125.0	301.0	(38)
Foreign	129.0	157.0	(18)	340.0	363.0	29
Amoco (worldwide)	227.0	(99.0)	--	441.0	30.0	137
Shell	5.0	73	(93)	9.0	52.0	(83)
BP America	na	na	na	na	na	na
Arco	85.0	175.0	(51)	159.0	247.0	(36)
Phillips	58.0	175.0	(51)	181.0	278.0	(35)
Conoco	160.0	135.0	19	na	na	--
Sun	73.0	131.0	(44)	111.0	156.0	(29)
Marathon *	131.0	263.0	(50.2)	233.0	340.0	(31)
Coastal	29.0	56.0	(48)	60.0	106.0	(43)

** Operating income, not net.*

Said Texaco president/CEO James Kinnear, "The weakness in the U.S. economy during the second quarter contributed to the reduced demand for gasoline and other petroleum products which depressed refined product margins, the primary cause of the lower second-quarter earnings. Margins on the West Coast were especially hard hit."

• TRENDS

Joint Project Could be A 'Clean Air' Winner

It may be somewhat of a long shot, but Sun Refining and Marketing and Sinclair Refining Corp. are jointly working on a community project to help keep Tulsa, Okla., out of trouble with federal environmental authorities. If it works, other communities might want to give it a try, too.

Tulsa made the federal government's "dirty air" list about 11 years ago. It achieved a cleaner status through the years and in October 1990 it was removed from the list and given a high social rating. In June, however, a combination of hot, windless conditions put Tulsa over the top again; it exceeded the maximum ozone level of .12-ppm (parts per million). Another situation like that and once again Tulsa would be simply another "dirty air" city.

Tulsa mayor Roger Randle appealed to Sun, Sinclair and others to help, if they could. The two oil marketers responded by lowering the reid vapor pressure (RVP) of all of their gasoline sold in the Tulsa marketplace by 1-lb./sq.in., from 9.5-psi to 8.5-psi.

The two companies and the city officials conceded that the joint action by Sun and Sinclair wouldn't solve the problem in its entirety, but it sure would go a long way in doing it. The program won't be without cost, but consumers will never feel it. Both oil companies are absorbing the extra cost in manufacturing the new RVP gasoline.

Said Randle, "The oil industry in Tulsa is to be applauded for stepping to the forefront in identifying and implementing these measures which will play a major role in Tulsa's fight to stay off the 'dirty air' list. What makes this program unique is the fact that these companies are making these sacrifices voluntarily to protect Tulsa and its environment."

William G. Rosenburg, assistant administrator for air and radiation with the U.S. Environmental Protection Agency, also joined in the applause. "This decision to reduce gasoline volatility and assist Tulsa in maintaining its status as an attainment area is an outstanding example of voluntary industry initiative to improve air quality. I applaud their vision and efforts in taking this responsible step to protect the environment."

Sun's director of business development and strategic planning, J.G. Driscoll, chipped in his two cents' worth at the Tulsa conference sponsored by the mayor and the city: "Since Sun's refinery delivers more than half of all the gasoline marketed in the Tulsa metropolitan area, we hope our action will have a major positive effect on emissions from vehicles and retail pumps. While no one can guarantee that this will keep Tulsa in attainment of ozone standings, it will increase that likelihood significantly."

John Goodwin, manager of human resources for Sinclair, summed it all up this way: "Local government officials asked for our help and we were happy to do our part in being a corporate citizen."

Mayor Randle urged other Tulsa businesses to join in a common program to educate citizens about comparable actions that would help reduce ozone levels.

One of these was a special program under which the Tulsa transit company on "ozone alert days" will provide free bus rides for everyone provided private cars were left at home.

The oil companies' cooperative RVP program continued through the rest of the summer months. Although the program seems routine, it's still a major effort by a community and its major gasoline suppliers to keep off the "dirty air" list rather than wait until it happens and then fight the uphill battle to get off.

Getting down to a RVP 8.5-psi isn't an easy task for refiners. Both cost and timing are key ingredients, and deliveries to stations must be monitored constantly to ensure that the gasoline specifications and pressure levels are well within the mandates of the federal and state governments.

The problem, of course, is not unique to Tulsa. Many cities and states have similar borderline situations. The willingness of Sun Refining and Marketing and Sinclair to respond so quickly to a municipal SOS for help, however, is to be applauded and cited as an example for others to emulate.

—J. Richard Shaner

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (per gal.)

JUNE	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.214	*	$1.160	$1.338
Regions				
Northeast	1.280	*	1.210	1.401
North Central	1.217	*	1.178	1.346
South	1.204	*	1.135	1.314
West	1.161	*	1.123	1.297

** Data no longer collected or available.*
Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	7/26/91	7/27/90
Gasoline (Total) [a]	210,847	215,554
Jet Kerosine	43,044	44,638
Distillates	120,424	118,613
Residual	44,612	44,743

[a] *Leaded regular prices no longer collected by Bureau of Labor Statistics.*
Source: American Petroleum Institute.

C-Stores, C-Stores, C-Stores... ...Who are They? ...Where are They?

Consider for a moment the total number of convenience stores in today's marketplace. One industry organization reports there are 71,200 C-stores currently. Another pegs the number at 84,500 stores. Others have come up with their own figures or estimates.

These numbers are certainly intriguing and I think these organizations should be commended for at least attempting to determine the total C-store population.

However, after just completing a C-store survey of our own, I believe it's virtually impossible to tabulate every convenience store, kiosk and island marketer that exists today. Why? A main reason is that the C-store industry is still squabbling over the exact definition of a convenience store. And to make matters worse, many C-store operators, along with a couple of major oil companies and a few petroleum marketers do not want to tip their hand to the competition and therefore do not respond to surveys of this type.

While the convenience store industry scrambles to come up with a total C-store universe, we at NPN decided to go a step further. Rather than giving you another "total" figure to gnaw on, we have decided to show you where the preponderance of C-stores are located on a state-by-state basis as well as tracking some of the growth patterns over the past couple of years.

We do not claim to know all the C-stores that are out there today. Instead, we have compiled a list of more than 500 companies that represent the great bulk of convenience stores that also sell gasoline.

We asked these companies to reveal information about their past and present status and future plans for their retail sites. Some of their responses are very illuminating.

After putting in hundreds of hours of research and getting a few of my staff members just slightly disjointed about the workload, we believe we have compiled a comprehensive list of companies.

Similar to our retail gasoline outlet survey we unveiled in April, we hope to make this an annual exercise as well. In addition, each year we hope to add more names to our list.

I want to thank all the oil companies, marketers and C-store operators who took the time to either answer the questionnaire or who responded to our phone survey. We realize that you are all bombarded with numerous surveys from the industry all year long.

I hope the data we compiled not only clears up some of the confusion, but gives you a better picture of the C-store universe. —Peggy Smedley

Convenience stores have become almost as familiar a sight on the American scene as the old corner gasoline station. In fact, many thousands of those old stations have become C-stores. The gasoline pumps are still out front at most of those sites. But the service bays and the tiny office with its cigarette and soda pop machines have been replaced by modern, attractive facilities that offer a wide selection of food and sundry items to an increasingly convenience-minded motoring public.

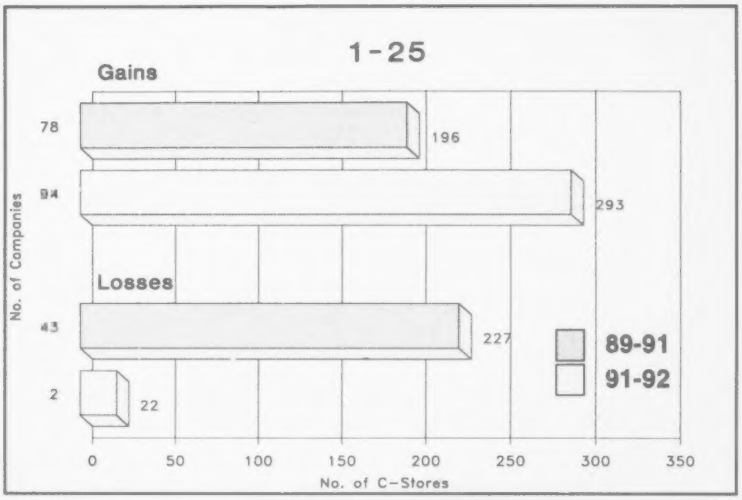
During the past 10 years or so convenience stores have been popping up just about everywhere. They vary in size from about 500-sq.ft. to 3,500-sq.ft. and in some cases even larger. Generally, they offer a variety of products that appeal to a consuming public that has less and less time to putter around from shop to shop, looking for a few needed items. Convenience of location and savings of time put the C-store on the American retail map and they will keep it there.

The variety of product and service offerings at many C-stores has grown almost geometrically. Hot dogs, pizza, fried chicken, soda fountain drinks, gum, candy, deli foods, beer and wine, ice cream, nachos, videos, automatic teller machines, lottery tickets and much, much more have become staples at many thousands of C-stores.

However, in recent years there have been some fundamental changes in the C-store industry. And those changes will determine the industry's course for the next decade and will sort out who the major players will be and who will pass from the scene.

Until recently, the traditional convenience store chains have dominated this fast-paced industry. However, during the past three years there has been a shakeout throughout the traditional C-store population. Old line pioneers of the business like Southland and Circle K, have been jolted financially and are struggling to get back on their feet.

But the most dramatic development is that most C-store companies are finding themselves in tough head-to-head competition with petroleum marketers and major oil companies. The majors, independent gasoline chains and marketers have been investing heavily in upgrading their existing facilities and adding new C-store operations. For these firms, C-stores offer an ideal opportunity to create an additional profit center at their locations, pull in more traffic and recover their often heavy investments in property and facilities.



Bigger stores

In past years, many oil company locations had only small kiosks or island marketers on the precept of "get 'em in and get 'em out, and don't block the islands." But this, too, is changing. While some oil companies are sticking with the island marketer style, others are building full-size stores with expanded product mixes and all the trimmings.

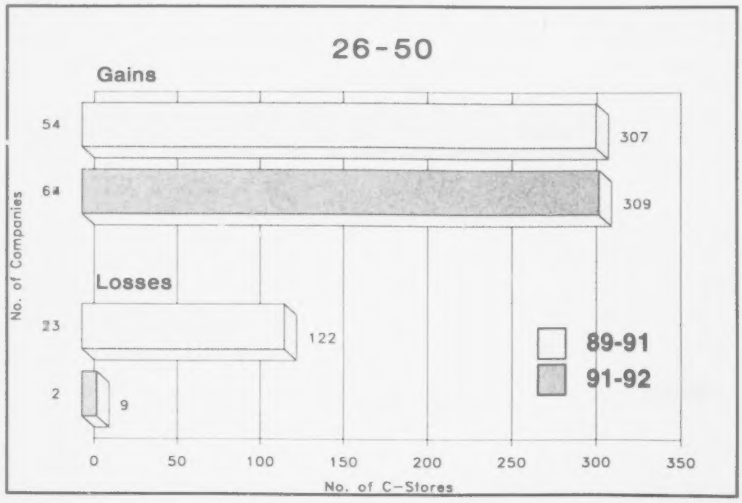
This will most likely affect market share for merchandise sales in many areas as 500-sq.ft. to 1,000-sq.ft. units with $10,000-$15,000/mo. in inside sales give way to 1,500-sq.ft. to 3,000-sq.ft. stores generating two to three times those dollar figures.

In addition to the intense competition, environmental regulations and expensive store acquisitions have also complicated this marketing environment. Environmental expenses particularly have diverted capital that would normally be devoted to expansion or new construction for oil firms and C-store chains alike.

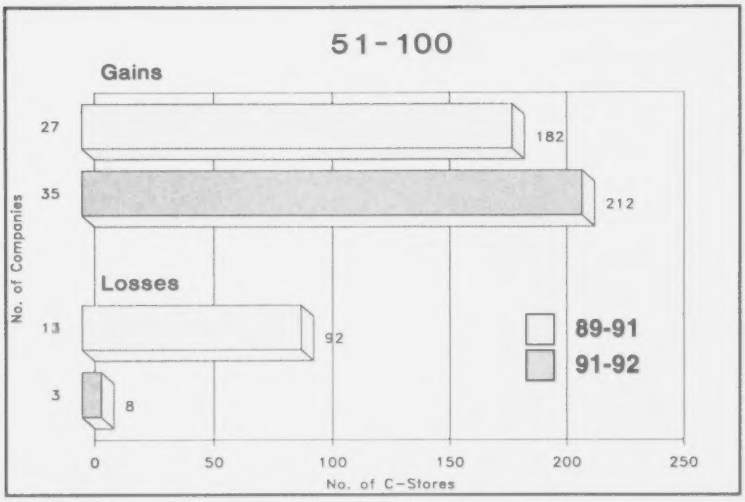
Hardly anyone would dispute the fact that the all-out building race that began several years back in the convenience store industry is starting to tapper off. More and more companies are retrenching and reevaluating their retail operations.

The hard-headed managers who run today's companies have discovered that growth in numbers doesn't automatically translate into growth in profitability.

The majors learned that lesson back in the early 1980s when they found that a station on every corner is not the most cost-effective way of doing business. The pattern of restructuring and downsizing of their retail networks that began during that period (and continues today) is now being repeated by several of the larger C-store companies. Firms like Houston-based National Convenience Stores (NCS) are pulling back to their primary markets where they enjoy strong market share, brand recognition and distribution and advertis-



An *NPN* Special Report



ing efficiencies.

On the whole, this downsizing is a healthy trend. Oil companies and traditional C-store chains are examining their markets and unloading the "poor performers," while at the same time investing more time and money into their prime locations. These companies are upgrading their image and sprucing up their signage, logos and graphics. They're adapting their product offerings and marketing strategies to suit local customer tastes. With a few exceptions, the era of building cookie-cutter C-stores is over.

New data

Over the past several months, *NPN* editors have been collecting convenience store industry data by surveying owners and operators around the country. To gather this data, *NPN* mailed out hundreds of C-store questionnaires to major and independent oil companies, petroleum marketers and large, mid-sized and small C-store firms.

To supplement this survey information, data from the 1991 annual *Factbook* questionnaires were incorporated. In addition, hundreds of follow-up telephone interviews were conducted by *NPN* staffers.

The questionnaires and interviews were designed to elicit as much information as possible about industry trends. It was not *NPN's* intention to derive another total C-store "universe" number. Instead, this report focuses on company growth patterns and plans—which companies are growing and which are pulling in the reigns on their C-store investments.

In all, *NPN* polled more than 500 companies that not only operate convenience stores, but also sell gasoline. The C-store/gasoline outlet combination has clearly become the dominant marketing style for both petroleum companies and C-store firms.

In its survey, *NPN* also sought information on C-store location, by state, of each company's retail sites. This information, while not 100% complete for all industry firms, represents the first time this data has ever been available or published.

Many of the companies polled responded to all the questions, including the state-by-state breakdown of their retail locations. Others, however, were a little less revealing and didn't answer all the questions. However, the information on the following pages provides a good picture of where the C-stores are located and who owns them.

In addition to the state-by-state tabulations, there are summary charts in this report that show how many total C-stores each company owns. For a good percentage of the responding companies, the charts also track key trends such as growth in C-store outlets since 1989 and projected growth in outlets through 1992. Also shown, for many companies, are the number of franchised and salaried operations, the number which sell gasoline, average per outlet gasoline sales and average store size for mini and full-size outlets.

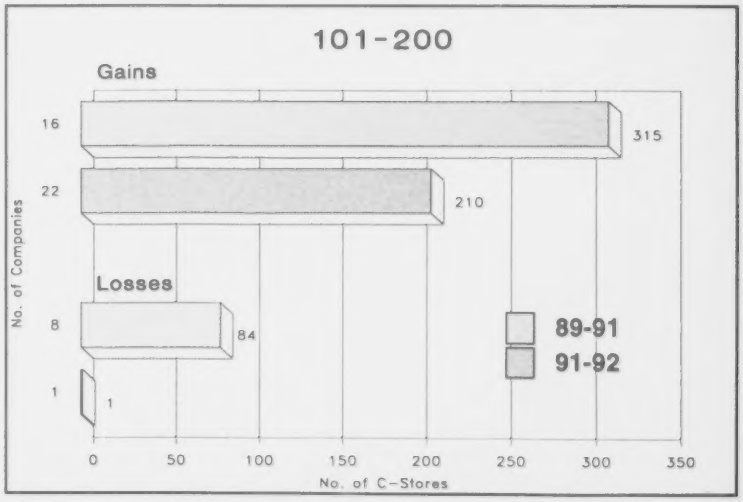
Numbers game

An analysis of the C-store numbers by company size (1-25 stores, 26-50 stores, etc.) reveals some very interesting trends. Here's how those numbers break out:

- 1-25 C-stores. Of the total 211 companies that responded as having 25 or fewer stores, 78 reported that they added a total of 196 C-stores between 1989-1991. In this same group, 94 companies report that they will add 293 stores by the end of this year and in 1992.

  However, in the same category, 43 firms reported that they closed 227 stores during the 1989-'91 period. Two companies report that they will close (or perhaps sell off) 22 stores by the end of 1992.

  (Note: The projected store additions and closings for 1991 and 1992 have been combined for clarity.)
- 26-50 C-stores. Companies that currently have between 26-50 stores say they added 307 units during 1989-'91. Sixty-four companies report they will add 309 during 1991-'92. In our 112-company sampling, 23 report they closed 122 stores between 1989-'91 and two more companies report they will close 9 units at the end of 1992.
- 51-100 C-stores. Twenty-seven companies in the 51-100 store range added 182 units between 1989-'91 and 35 companies say they will add another 212 units before 1993. In the same category, 13 companies reported that they closed 92 stores during the two year period and three firms report they will shut down an additional eight units before the end of next year.
- 101-200 C-stores. Sixteen companies report they added 315 C-stores during 1989-'91 and 22 companies say they will



add 210 before 1993. Eight companies report they closed 84 during 1989-'91 and one firm says it will shut down only one location by the end of 1992.

● 200 plus C-stores. In the 201-plus range 13 companies say they added 502 units during three-year period beginning in 1989. Eighteen firms say they will increase their stable by an additional 505 units by 1992. However, six companies report they shut down 59 locations and one company reports it will close only one site before the end of 1992. The figures for this category, by the way, do not include C-store numbers for 21 of the major and semi-major oil companies. These numbers are analyzed separately below.

Looking at these numbers it's apparent there have been some winners and losers in the last two years in the C-store business as far as store counts are concerned. The smallest firms (1-25 C-stores) had a net loss of 31 stores in the 1989-'91 period. One reason for this could be that environmental regulations on underground storage tanks and financial responsibility have taken their toll on those companies least capable of affording the investments required to comply with the regs.

On the other hand, many of these small firms are obviously upbeat about the future. Almost half of the respondents project an increase in store counts—an average of three new stores per company—by the end of next year.

On the whole, companies in the next four categories (26-50, 51-100, 101-200, 200-plus) have been adding C-stores at a break-neck pace since 1989. More than twice as many companies in these groupings showed increases in store counts compared to those firms reporting losses. The net gain (subtracting losses) since 1989 for these companies was 1,049 C-stores.

The pace of growth anticipated by these companies this year and next is even more impressive. They project a net gain of 1,307 stores by the end of 1992. Only seven companies expect a net loss of stores by the end of next year.

What majors are doing

NPN's survey clearly shows that the major and semi-major oil companies are elbowing their way into the C-store business in significant numbers.

Of the 26 major companies responding, 17 reported adding a total of 2,627 C-stores to their chains since 1989. Only three companies reported lower numbers for the period, an inconsequential total of 11 fewer stores.

While firm numbers on future growth by the majors are somewhat difficult to gather, given these companies' historical reluctance to reveal future plans, 11 firms say they are planning to add 642 C-stores by the end of 1992, an average of almost 60 additional stores per company. This is a net gain, since no company said it expected to close stores in that time frame.

It's interesting to note the striking contrast between the growth of the major oil firms and the relative stagnation, in terms

(Continued on page 50)

Reading the Numbers

Some care should be exercised in evaluating the information presented for certain individual companies in this report. This applies specifically to the major oil company data.

Compared to C-store companies, most indepent gasoline chain retailers and petroleum marketers, the majors and semi-majors have complex distribution and marketing systems. The companies market through their own "direct-supplied" retail outlets, which include both salary-operated and lessee dealer locations, and through marketer and commissioned agent distributors.

In responding to the *NPN* survey, most of the companies submitted data for their direct-supplied locations only. However, several of the majors combined both direct-supplied and marketer-supplied C-store outlets in their totals.

Among this latter group is Star Enterprise, Texaco's joint venture company (with Saudi Arabia) which markets mainly in the East and Southeast portions of the country. Star provided very detailed data on both its direct and marketer C-store outlets, a total of more than 5,000 locations. It's direct-supplied total is an estimated 850 outlets, according to company sources.

Texaco Refining and Marketing (TRMI), the other half of this retail giant's marketing network, reported only direct-supplied outlets, a total of 471. In addition, a company marketing source said, there are approximately 900 TRMI marketer-supplied Texaco branded C-stores. This would put the total of TRMI direct and marketer supplied C-stores at about 1,370.

Thus, the combined total of Star and TRMI direct C-store outlets is approximately 1,320. Total C-stores flying the Texaco flag amount to about 6,800 units.

Other companies shown in the tables which combined direct and marketer outlets include Shell (1,300 reported outlets) and Unocal (2,188 outlets). Unocal's numbers also exclude its Uno-Ven joint venture (with Venezuela) outlets in the Midwest. Sun's totals in the summary table represent direct-supplied outlets only, but the state-by-state breakdown include both direct fuel marketer-supplied convenience stores, excluding its Atlantic division marketer-supplied outlets.

There are an extraodinary number of major brand marketer-supplied outlets in the United States. While complete figures on the marketer supplied total is not available, *NPN* was able to obtain numbers for this category from 13 major companies. Several other companies have no marketer-supplied outlets.

The 13 companies report a total of approximately 32,000 branded marketer-supplied C-stores. Amoco, for example, says its branded marketers operate about 4,000 C-stores, which would bring the total number of Amoco-branded outlets to over 5,800. Chevron's estimate of its marketer supplied outlets is 2,900, Total has 2,000 and Diamond Shamrock has 1,000.

For some companies, distribution is almost entirely achieved through marketer-supplied outlets. Only a handful of Unocal's 2,188 branded C-stores are company-operated, according to company sources. Fina has 148 direct-supplied locations and 2,700 marketer outlets.

Citgo, however, takes the prize as a marketer-oriented company. Citgo reports only 15 direct-supplied locations, but there are also 6,300 marketer C-stores which sell Citgo branded gasoline.

While these companies do not own or control their marketer locations, most exert a strong influence in how those outlets are operated. Most marketers are obligated to meet their suppliers' branded image standards and abide by policies on credit cards and the like. The companies provide merchandising programs and advertising support to help their marketer customers increase sales. And they assist marketers in rehabbing existing C-stores and in building new units through rebate programs and other incentives.

One final footnote to this report: Nine companies with two or fewer stores in one state are not included in the state-by-state breakdown. These firms are California-Fresno Oil Co., (two in California); Chiles Oil, Inc., (two in Tennessee); Consumers Oil, (one in New Jersey); Dickey Inc., (one in Iowa); Geldbach Petroleum Co., Inc., (two in Missouri); Pacific Northern Oil Co., (two in California); Private Brand Services, Inc., (one in Michigan); Royster Oil Co., Inc., (one in North Carolina) and Younger Oil Co., (two in Oregon).

NPN 's Convenience

Company	H.Q. Location	C-Store Name	No. of States Where Stores Are Located	Company Operated	Franchise Operated
ABC Discount Stores	Honolulu, HI	ABC Stores/MNS Limited	1	48	0
Acme Petroleum Fuel Co. Inc.	Gastonia, NC	Handy Pantry Food Store	2	76	0
Adens Minit Markets	Douglas, GA	Aden's Minit Market	3	39	0
Aldin Associates	East Hartford, CT	Chucky's Food Store	1	31	0
Allen Stop N Shops Inc.	Kingsville, TX	Stop-N-Shop/Jolly Rogers	2	55	0
Allsup's Convenience Stores Inc.	Clovis, NM	Allsup's Convenience Store	3	305	0
Amerada Hess Co.	Woodbridge, NJ	Hess Mart	5	127	0
American Accessories Inc.	Beckley, WV	Little General	2	30	4
American Personnel Service	Pleasanton, CA	APSI/Chevron Food Mart	6	64	0
Amoco Oil Co.	Chicago, IL	Amoco Food Shop	27	268	1,356
Arco Products Co.	Los Angeles, CA	am/pm Mini Market	5	N/A	N/A
Arkansas Valley Petroleum Corp.	Tulsa, OK	Git-N-Go	2	0	15
Ashland Oil, Inc.	Ashland, KY	SuperAmerica	17	624	38
Atlas Oil Co.	East Hartford, CT	Atlas Store	2	18	0
Aztex Enterprises	Knoxville, TN	Aztex	1	21	0
B & B Cash Grocery Stores	Tampa, FL	Handy Food Store	1	33	0
Baron Oil Co.	Jacksonville, FL	Baron Convenient Plus	1	24	0
Beard Co.	Boise, ID	Go-Far	1	6	0
Bearden Oil Co.	Eastman, GA	Shorty's Quick Shop	1	8	3
Beck Suppliers	Sandusky, OH	Friendship Convenience Store	1	2	0
Bedford Valley Petroleum Corp.	Everett, PA	RG's Food Shop	3	6	0
Bell Fuels, Inc.	Chicago, IL	Road Pilot/Road Pantry	1	9	0
Berwick Bay Oil Co. Inc.	Morgan City, LA	Friends/Delta Mart	2	38	2
Best Oil Co.	Pittsburgh, PA	Toot-N-Scoot	2	19	0
Big Apple Food Stores	South Paris, ME	The Big Apple	2	43	0
Bi-Rite Petroleum, Inc.	St. Louis, MO	Coastal Mart	1	3	0
Blaze Oil Co.	Casper, WY	Common Cents	1	5	0
Boardman Petroleum Inc.	Augusta, GA	Smile Gas	5	50	0
Bosselman's Oil Co.	Grand Island, NE	Pump & Pantry	1	34	0
BP America, Inc.	Cleveland, OH	BP Shop	15	800	0
Bradley, Inc.	Denver, CO	Bradley Food Mart	2	19	0
Broken Hill Prop./Pacific Resources	Honolulu, HI	Express Mart	1	N/A	N/A
Brooks Food Markets	Minnetonka, MN	Brooks Food Market	1	32	2
C.R. Brown Oil Co.	Grand Junction, CO	Go-Fer Foods	3	3	16
Browning Oil Co.	Bowling Green, KY	Shell Food Mart	1	10	3
Burgess Marketing, Inc.	Waco, TX	Various	1	N/A	N/A
Bursaw Oil Corp.	Danvers, MA	Pump 'N Pantry	1	8	0
By-Lo Oil Co.	Port Huron, MI	Speedy Q Market	1	15	0
California-Fresno Oil Co.	Fresno, CA	Food Store	1	2	0
Callahan Oil Co.	New London, CT	Grampy's	6	22	0
Camp Oil Co.	Rome, GA	Smile/Sav-A-Ton	9	45	0
Campbell Oil Co.	Massilon, OH	Spee D Foods	1	11	28
Cannon Oil Corp.	Dothan, Al	Cannon	3	16	0
Casey's General Stores, Inc.	Des Moines, IA	Casey's	8	0	202
Cel Oil Products Corp.	North Charleston, SC	Unocal Mart	1	7	0
CENEX Petroleum, Inc.	St. Paul, MN	Cenex C-Store/Town Mart	12	20	289
Centennial Liquor Stores	Dallas, TX	Quik Shop	1	9	0
Center Independent Oil Co.	Smock, PA	Sweet Peas	1	5	0
Certified Oil Co.	Columbus, OH	Certified Mini Mart	1	18	0
CF Marts of Pennsylvania	Clarks Summit, PA	Convenient Food Mart	1	4	23
CFM Development Corp.	Wheeling, WV	Convenient Food Mart	2	1	28
Champlain Oil Co.	South Burlington, VT	Colonial Deli Mart	4	74	0
Chapman, Inc.	Sherman, TX	Food Mart	1	5	10
Chevron USA, Inc.	San Francisco, CA	Chevron FoodMart	25	516	514
Chico Dairy, Inc.	Morgantown, WV	Dairy Mart Foods	4	39	0
Chiles Oil, Inc.	Pulaski, TN	Snappy's/Parkway Market	1	2	0
CHR Corp.	York, PA	Rutter's Farm Store	1	51	0
Christy's Markets, Inc.	Brockton, MA	Christy's	4	116	18
Circle C Food Stores	Huntsville, AL	Circle C Food Store	1	N/A	N/A
The Circle K Corp.	Phoenix, AZ	Circle K Convenience Store	32	0	63
Citgo Petroleum Corp.	Tulsa, OK	Quik Mart/Citgo Quick Mart	2	15	0
Clark Oil & Refining Corp.	St. Louis, MO	Clark	12	N/A	N/A
Clipper Petroleum, Inc.	Gainesville, GA	Circle M Food Mart	1	19	0
Cloud Enterprises, Inc.	Pell City, AL	Cloud Cupboards	1	29	0
Coastal Refining and Marketing, Inc.	Houston, TX	Coastal Mart	28	N/A	N/A
CoCo Marts, Inc.	Burlington, VT	Jiffy Mart	3	17	0
CoGo's Co.	Pittsburgh, PA	CoGo's	1	65	0
Colonial Oil Industries, Inc.	Savannah, GA	Enmark	3	7	0
Comet Oil Co.	Savannah, GA	Comet	2	2	0
Como Oil Co.	Duluth, MN	Milk House	2	3	12
Conoco Inc.	Houston, TX	Conoco/Jet	22	N/A	N/A
Consumers Gasoline Stations, Inc.	Nashville, TN	Scott/Consumer	3	45	0

KEY: N/A Precise figures not disclosed by company ? Plan to add C-stores, but exact number unknown — Does not pertain

Store Summary

1989 Total	1990 Total	1991 Current	1991 Projected	Additions Projected in 1992	Number With Gasoline	Avg. Gasoline Volume Per Store	Avg. Gasoline Volume Per Month	Size Sq. Ft	
						Mini	Full	Mini	Full
N/A	N/A	48	?	3	3	—	N/A	—	2,500
95	90	76	69	0	71	N/A	N/A	500	2,000
33	39	39	N/A	0	39	N/A	N/A	N/A	N/A
N/A	31	31	?	?	24	—	N/A	—	N/A
55	63	55	62	0	55	—	80,000	—	3,200
300	305	305	305	0	305	N/A	N/A	600	2,400
N/A	100	127	140	20	127	—	150,000	—	1,200
25	30	34	36	1	33	N/A	N/A	900	2,000
N/A	N/A	64	69	5–10	64	220,000	—	N/A	—
1,200	1,902	1,847	N/A	N/A	1,847	120,000	—	1,000	—
720	731	752	N/A	N/A	746	N/A	N/A	800	1,800/1,900
13	14	15	15	0	15	—	60,000	—	2,400
595	601	662	N/A	N/A	600	—	N/A	N/A	1,800/4,000+
N/A	18	18	18	0	18	150,000	—	700/800	—
36	31	21	21	0	21	100,000	60,000	800	1,500
37	34	33	35	?	31	N/A	N/A	N/A	N/A
N/A	16	24	50	0	24	—	N/A	—	1,500
5	6	6	7	1	N/A	75,000	75,000	800	1,300/3,000
N/A	11	11	11	0	11	—	N/A	—	1,800/2,000
0	1	2	2	1	2	—	150,000	—	1,800
2	5	6	8	1–2	6	50,000	55,000	800	1,400
8	10	9	9	0	9	N/A	N/A	500	N/A
40	38	40	41	1	38	53,000	53,000	800	2,000
14	18	19	19	0	19	N/A	N/A	N/A	N/A
N/A	38	43	47	5	43	—	35,000	—	1,200
3	3	3	5	2	3	50,000	100,000	900	1,300
5	5	5	5	1	5	N/A	N/A	800	2,500
27	42	50	52	3	44	150,000	200,000	600	2,000
N/A	33	34	35	?	34	—	50,000	—	2,400
700	750	800	825	35	800	150,000	150,000	650	1,200
19	19	19	?	?	19	—	180,000	—	1,800
N/A	N/A	10	N/A	N/A	N/A	N/A	N/A	N/A	N/A
27	30	32	34	3–5	30	—	60,000	—	3,000
N/A	19	19	21	2	19	—	65,000	—	2,400
10	13	13	14	1	13	59,000	79,000	800	1,500
N/A	N/A	50	N/A	N/A	50	N/A	N/A	N/A	N/A
6	8	8	10	?	8	N/A	N/A	800	2,400
N/A	N/A	15	?	?	13	—	N/A	—	N/A
1	2	2	2	—	—	165,000	125,000	900	2,700
N/A	21	21	22	3	22	—	80,000	—	up to 6,000
N/A	47	45	46–49	?	47	N/A	N/A	N/A	1,800/2,400
45	45	39	?	?	14	75,000	80,000	—	2,300/3,300
16	16	16	16	0	16	—	75,000	—	1,800
732	769	781	800	30	781	—	38,000	—	2,375
N/A	6	7	N/A	?	7	—	125,000	—	N/A
225	309	309	337	27	309	38,000	60,000	800	2,200
8	9	9	?	?	5	N/A	N/A	N/A	N/A
4	4	5	?	?	5	—	—	—	—
N/A	15	18	22	?	18	—	N/A	—	2,400
27	26	27	3	3–5	6	—	N/A	—	3,200
29	29	29	31	1–3	1	—	N/A	—	3,500
53	72	74	8	0	74	50,000	45,000	—	2,400
15	15	15	18	3	15	40,000	60,000	800	1,500
N/A	1,030	1,030	1,080	50	1,030	150,000	150,000	600	1,200
39	39	39	36	3	33	N/A	—	N/A	—
2	2	2	2	0	2	—	25,000	—	2,100
49	51	51	52	3	32	—	58,000	—	2,400
N/A	132	134	136	10	32	—	50,000	—	2,600
N/A	34	30	?	?	29	—	11,000	—	1,400
4,664	4,783	3,859	3,600	0	3,186	30,000	40,000	900	2,800
N/A	16	15	15	?	15	125,000	200,000	400	2,400
N/A	N/A	905	N/A	N/A	905	N/A	—	300/900	—
N/A	19	19	20	1	18	100,000	75,000	900	2,350
N/A	59	29	29	?	29	—	N/A	—	2,000
N/A	N/A	572	N/A	N/A	572	60,000	60,000	N/A	2,000
N/A	16	17	16	1–2	15	—	35,000/40,000	—	2,400/2,800
N/A	65	65	68	3	22	—	N/A	—	2,400
6	6	7	6	0	6	100,000	200,000	500	3,000
2	2	2	2	0	2	35,000	—	500	—
12	15	15	16	0	15	—	55,000	—	1,800
477	476	476	494	17	476	91,000	—	1,000	—
N/A	43	45	45	?	45	45,000	N/A	N/A	N/A

C-Store Summary (Cont.)

Company	H.Q. Location	C-Store Name	No. of States Where Stores Are Located	Company Operated	Franchise Operated
Consumers Oil	Trenton, NJ	Hightstown Texaco	1	0	1
Con Sun Food Industries	Elyria, OH	Convenient Food Mart	1	14	22
Contemporary Industries Corp.	Omaha, NE	7-Eleven	7	93	22
Convenience Marketers Inc	Bessemer, AL	JR. Food Mart	2	23	0
Convenient Food Mart	Schaumburg, IL	Convenient Food Mart	16	30	449
Convenient Petroleum Corp.	East Hartford, CT	Petro Panty Foods	1	9	0
Country Cupboard Food Stores, Inc.	Dawsonville, GA	Country Cupboard	1	41	0
Country Fair, Inc.	Erie, PA	Country Fair	3	N/A	N/A
Cox Oil Co.	Union City, TN	Little General	1	24	0
Cracker Barrel Stores, Inc.	Baton Rouge, LA	Cracker Barrel	1	61	0
Crown Central Petroleum Corp.	Baltimore, MD	Crown/Fast Fare/Zippy Mart	9	467	97(a)
Crown Oil Co.	Minneapolis, MN	E-Z Stop	3	26	0
Crystal Flash Petroleum	Indianapolis, IN	CF Deli Bake	1	24	0
Cumberland Farms, Inc.	Canton, MA	Cumberland Farms	11	1,118	0
Curt's Oil Co., Inc.	Muskogee, OK	Curt's	3	13	0
Curtis Parker Oil Co. Inc.	Shreveport, LA	Various	1	4	0
Dairy Mart Convenience Stores	Enfield, CT	Dairy Mart Convenience Store	11	724	465
Davis Co. Inc.	Perry, GA	Qwik Stop Food Plus	1	20	0
J.M. Davis Inc.	Morehead City, NC	Jim Dandy/Handy House	1	19	0
Day & Night Food Stores, Inc.	Vestal, NY	Day & Night Food Store	1	18	0
Dead River Oil Co.	Rumsford, ME	Food Trends	2	9	0
DeBlois Oil Co.	Providence, RI	DB Mart	2	29	0
Delicatessen Dist. Inc.	Pittsburgh, PA	Isaly's Store	2	0	20
Delta Sonic Carwash Sytstems	Buffalo, NY	Kiss Mart	2	19	0
Diamond Shamrock	San Antonio, TX	Corner Store	3	N/A	N/A
Dickey Inc.	Packwood, IA	Dickey Prairie Home	1	1	0
Dilmar Oil Co.	Latta, SC	Food Chief C-Store	1	22	0
District Petroleum Products	Sandusky, OH	Hy-Miler Food Store	1	23	2
Dixie Oil Co.	Tifton, GA	Dixie Food Store	3	68	0
Down East Energy Co.	Brunswick, ME	Puffin' Stop	2	22	0
Drakes Refinery Stations	Lansing, MI	Drakes Market Plus	1	16	0
Dunn Oil Co.	Salt Lake City, UT	Dunn's Kwik	1	6	0
East Coast Oil Corp.	Richmond, VA	East Coast	1	35	0
Eastern Fuels, Inc.	Ahoskie, NC	Red Apple	2	43	0
Emro Marketing Co.	Springfield, OH	Speedway/Starvin Marvin/Bonded/ ECOL/Port/United/Checker/Gastown	16	1,168	0
Englefield Oil Co.	Newark, OH	Duchess Shoppe	2	53	0
Entrepreneur Inc.	Wilmington, NC	Scotchman's Store	5	159	0
Erickson Oil Products, Inc.	Hudson, WI	Freedom Value Center	4	45	0
Evans Group	Lebanon, NH	Evans Express Mart	2	7	0
Ever Ready Oil Co.	Albuquerque, NM	Various	1	10	0
Express Lane, Inc.	Panama City, FL	Express Lane	2	30	0
Exxon Company, USA	Houston, TX	Exxon Shop	27	346	350
EZ Mart Stores, Inc.	Texar Kana, TX	EZ Mart	5	324	0
E-Z Serve Inc.	Kingsville, TX	Stop-N-Shop	1	55	0
Farm & Home Oil Co.	Telford, PA	Farm & Home Corner Store	1	5	0
Farm Fresh, Inc.	Wheeling, WV	Farm Fresh, Inc.	2	17	0
Farmland Industries	Kansas City, MO	AmPride	9	6	20
Farm Stores, Inc.	Miami, FL	Farm Store	1	228	0
Fas Mart Convenient Stores	Mechanicsville, VA	Fas Mart	1	42	0
Favorite Market	Dalton, GA	Favorite Market	3	N/A	N/A
Fearless Farris Oil Co.	Boise, ID	Handi Mart	3	32	0
FINA Oil & Chemical Co.	Dallas, TX	FINAMART	7	148	0
FKG Oil Co.	Belleville, IL	Moto Mart	6	51	0
Flash Foods, Inc.	Waycross, GA	Flash Foods	2	94	0
Fleming Petroleum, Inc.	Pittsburg, KS	Short Stop	1	4	0
Fleet Oil Co.	Norcross, GA	Fleet	2	7	6
Flying J, Inc.	Brigham City, UT	Flying J, Inc.	8	35	3
Food N Fuel Inc.	Harvard, IL	Food N Fuel	1	3	1
Food Spot Management	Miami, FL	Food Spot	1	N/A	N/A
Foster Oil Co.	Richmond, MI	Sunrise Convenience Store	1	19	0
Four Star Service Stations, Inc.	Grand Rapids, MI	Four Star Service Stations Store	1	10	0
Fresh Way Food Stores	Greenville, NC	Fresh Way Food Store	1	22	0
H.N. Funkhouser & Co.	Winchester, VA	Handy Mart	1	11	0
Garb Co Inc.	Saginaw, MI	7-Eleven Food Store	4	N/A	N/A
Gas America Services, Inc.	Shirley, IN	Gas America	2	40	0
Gasco Gasoline, Inc.	Oxnard, CA	Gasco Mart	2	N/A	—
Gas Mart	Elizabethtown, NC	Minute-Man Food Mart	1	11	0
Gas N Shop Inc.	Lincoln, NE	Gas-N-Shop	2	N/A	N/A
Gate Marketing	Jacksonville, FL	Gate Food Post	9	128	0
Geldbach Petroleum Co., Inc.	Valley Park, MO	Stop Buy	1	2	0
General Oil	Gatesville, AR	Quik Mart	1		
Getty Petroleum Corp.	Plainview, NY	Getty Mart	10	135	174
Giant Industries, Inc.	Phoenix, AZ	Giant Food Store	3	44	0
Golden Gallon, Inc.	Chattanooga, TN	Golden Gallon	2	105	0
Golden Pantry Food Stores	Athens, GA	Golden Pantry Food Stores	2	97	0
Golub Corp.	Schenectady, NY	Mini Chopper	1	5	0
Go-Mart, Inc.	Gassaway, WV	Go-Mart Food Stores	3	64	0
Good Time Stores	El Paso, TX	Good Time Stores	1	41	0
Gresham Petroleum, Inc.	Indianola, MS	Double Quick	2	28	0

1989 Total	1990 Total	1991 Current	1991 Projected	Additions Projected in 1992	Number With Gasoline	Avg. Gasoline Volume Per Store Per Month		Size Sq. Ft	
						Mini	Full	Mini	Full
N/A	3	1	1	0	1	70,000	—	500	—
38	37	36	36	?	4	—	45,000	—	4,000
N/A	115	115	?	?	109	N/A	N/A	N/A	2,400
36	27	23	0	0	22	—	15,000	—	1,800
N/A	491	479	481	8	79	—	44,000	—	3,000
9	9	9	9	?	9	—	100,000	—	1,800
39	41	41	41	?	41	—	42,500	—	2,400
N/A	N/A	50	N/A	N/A	48	N/A	N/A	N/A	N/A
23	25	24	23	3	23	N/A	50,000	900	2,300
56	58	61	59	0	59	15,250	N/A	500	2,800
580	605	564	548	20	556	108,600	31,500	408	2,500
24	24	26	27	2	26	—	N/A	—	2,000
24	25	24	24	0	24	60,000	100,000	600	2,000
1,075	1,100	1,118	?	?	765	N/A	N/A	N/A	N/A
13	13	13	13	0	13	120,000	—	700	—
4	4	4	4	?	4	16,000	27,500	N/A	N/A
N/A	1,189	1,189	1,170	20	458	—	35,500	—	2,400
N/A	19	20	24	4	20	95,000	75,000	300	2,000
20	19	19	19	?	18	N/A	N/A	N/A	N/A
18	18	18	18	1	17	—	44,000	—	1,800
9	9	9	9	1–2	9	—	80,000	—	1,000/1,500
12	16	29	29	?	29	—	65,000	—	2,200
24	20	20	20	0	2	—	N/A	—	2,000
17	19	19	19	3	19	N/A	N/A	500	1,700
617	680	763	?	?	763	75,207	93,202	796	1,600
N/A	N/A	1	?	?	1	N/A	N/A	N/A	N/A
15	21	22	24	?	22	N/A	N/A	N/A	N/A
N/A	N/A	25	?	?	25	—	N/A	—	N/A
N/A	68	68	69	2	68	—	N/A	—	2,400
17	19	22	24	2	22	N/A	N/A	900	1,800
17	18	16	16	?	15	35,000	60,000	700	2,400
10	8	6	6	—	6	—	63,000/82,000	—	2,400/3,000
N/A	N/A	35	N/A	?	35	N/A	N/A	N/A	N/A
N/A	41	43	43	0	42	—	N/A	—	2,500
1,600	1,668	1,668	?	?	1,668	104,000	145,000	500/1,000	3,375
48	51	53	4–6	4–6	53	N/A	88,000	800	1,500/2,000
N/A	159	159	159	0	159	N/A	N/A	600	3,000
45	45	45	47	3	45	—	80,000	—	2,700
N/A	7	7	7	1	7	50,000	160,000	N/A	1,800
10	10	10	11	?	10	N/A	N/A	N/A	1,400
N/A	30	30	32	2	30	—	40,000	—	2,400
450	689	696	?	?	696	—	N/A	—	1,100
296	290	324	325	20	319	—	N/A	—	2,000
55	55	55	?	?	55	—	50,000	—	2,400
8	5	5	6	2	5	100,000	120,000	1,000	1,200
N/A	17	17	17	0	11	—	N/A	—	2,000
7	18	26	29	?	26	70,000	90,000	850	2,400
N/A	261	228	227	0	78	8,000	25,000	600	2,400
N/A	41	42	46	3	42	—	90,000	—	2,500
N/A	84	86	90	?	83	—	N/A	—	N/A
26	29	32	32	3–5	32	—	N/A	—	1,600/2,200
157	150	148	155	?	148	85,000	120,000	800	2,200
35	50	51	53	2	51	—	120,000	—	2,400
96	98	94	95	5	94	—	50,000	—	2,450
4	4	4	5	0	4	25,000	95,000	800	2,300
16	17	13	13	?	13	—	N/A	—	1,500
35	35	38	39	?	38	—	N/A	—	2,200
4	4	4	0	1	4	—	120,000	—	2,000
N/A	42	40	43	?	5	—	40,000	—	2,400
13	19	19	19	1	19	N/A	N/A	900	2,500
11	10	10	?	?	10	70,000	350,000	1,000	N/A
24	22	22	23	1	21	—	56,000	—	2,400
8	10	11	12	0	11	—	100,000	—	2,400
N/A	N/A	159	?	?	18	—	N/A	—	N/A
N/A	40	40	40	0	40	N/A	N/A	N/A	1,500
10	13	N/A	?	?	11	100,000	150,000	N/A	N/A
N/A	11	11	11	1	11	65,000	57,000	900	1,000+
N/A	36	40	?	?	40	—	50,000	—	N/A
N/A	128	128	128	3	115	N/A	N/A	—	2,000
1	2	2	2	1	2	—	N/A	—	1,800
33	29	31	?	?	?	—	50,000	—	1,400/3,000
454	578	561	575	?	521	37,500	37,500	600	1,800
20	30	44	44	?	44	—	N/A	—	2,500
N/A	105	105	112	?	96	—	100,000	—	N/A
N/A	N/A	97	?	?	97	—	N/A	—	N/A
5	5	5	5	5	5	—	40,000	—	1,000
N/A	60	64	69	5	64	—	170,000	—	2,650
39	41	41	41	0	40	—	N/A	—	2,400
26	28	28	30	2	27	—	33,000	—	1,600

C-Store Summary (Cont.)

Company	H.Q. Location	C-Store Name	No. of States Where Stores Are Located	Company Operated	Franchise Operated
Gull Industries Inc.	Seattle, WA	Express Home Quik Stop	3	20	12
Guttman Oil Co.	Belle Vernon, PA	Crossroad Food Mart	1	27	0
Hallum Oil Co.	Flagstaff, AZ	Hallum Store	11	11	0
Handee Marts Food Stores	Travelers Rest, SC	Handy Mart	1	18	0
Handy Andy Pantries	Chattanooga, TN	Handy Andy Pantry	2	24	0
Happy Food Stores, Inc.	Oklahoma City, OK	Happy Food Store	1	20	0
Harper Oil Co.	Springfield, IL	Harper	1	22	0
Harris Oil Co.	Portland, OR	Shell Food Mart/BP Food Mart	1	—	2
Hawaiian Independent Refinery, Inc.	Honolulu, HI	Gas Express	1	29	0
Hawk Oil Co.	Medford, OR	Tiger Mart	1	2	0
Herdrich Petroleum Corp.	Rushville, IN	Food Mart	1	17	0
Herkimer Petroleum Products	Utica, NY	Nice N Easy Grocery Shoppe	1	23	0
Herndon Oil Co.	Abbeville, AL	Herndon Oil Co.	2	20	0
Herndon Oil Corp.	Abbeville, AL	Super C/Midi Mart/Shell Food Mart	3	96	0
Highs Dairy Stores	Alexandria, VA	High's Dairy Store	5	192	0
Angus I. Hines, Inc.	Suffolk, VA	Sentry Food Mart	3	32	0
Holiday Oil Co.	West Valley City, UT	Holiday Oil	1	24	0
Holiday Station Stores Inc.	Minneapolis, MN	Holiday Station Store	7	222	20
Holland Oil Co.	Akron, OH	Gas N Shop	1	31	0
Honey's Inc.	Worchester, MA	Honey Farms	N/A	43	—
Horkey Oil Co., Inc.	Lubbock, TX	Friend's Convenience Store	1	21	0
Howdy Doody Inc.	Denton, TX	Howdy Doody, Inc.	1	0	20
Hudson Oil Co.	Tulsa, OK	Hudson	2	11	0
Hughes Energy, Inc.	Daytona Beach, FL	Sugarcreek	1	9	0
Hull Oil Co.	Panama City, FL	JR Food Mart/Hull	1	6	0
Huntley Jiffy Stores	Orange Park, FL	Lil' Champ Food Store	2	480	0
Imperial Oil Co.	Mt. Pleasant, MI	Next Door Food Store	2	36	2
Independent Retailers Assn.	Conroe, TX	Independent Retailers Assn Coop, Inc.	1	38	0
Iowa Oil Co.	DuBuque, IA	IOCO Speede Shoppe	3	30	7
J & L Oil Co.	Vernon Hills, IL	J & L Food Mart	3	29	0
Jaco Oil Co.	Bakersfield, CA	Fastrip Food Store	2	10	25
Jacobus Petroleum Products, Inc.	Milwaukee, WI	Jiffy Stop	1	9	3
JFM, Inc.	Jackson, MS	JR Food Mart	18	110	340
Jiffy Food Stores	Ocala, FL	Jiffy Food Store	1	20	0
Jiffy Marts	Christiansted, VI	Jiffy Mart	3	17	0
Jim Dandy Markets, Inc.	Nashville, TN	Jim Dandy Markets Inc.	1	32	0
Johnny's Quik Food	Fresno, CA	Johnny's Quik Food Store	1	23	0
Johnson Oil Co.	Columbus, IN	Big Foot	2	62	0
R.L. Jordan Oil Co. of No. Carolina, Inc.	Spartanburg, NC	Hot Spot	3	36	0
Junior Food Stores	Crestview, FL	Tom Thumb Food Store	2	104	0
Jr. Food Stores, Inc.	Bowling Green, KY	JR Food Store	2	54	0
Kaibab Industries	Phoenix, AZ	Whiting	1	18	0
Kampgrounds of America, Inc.	Billings, MT	Kampgrounds of America	47	14	636
Kangaroo, Inc.	Gainsville, GA	Kangaroo Convenience Store	1	32	0
L. Keller Oil Properties, Inc.	Effingham, IL	7-Eleven/Super Food Store	1	35	7
Kelley Williamson Co.	Rockford, IL	Mobil Mart	1	21	0
Kenny's Markets	Richfield, MN	Kenny's Market	1	N/A	N/A
Kent Distributors, Inc.	Midland, TX	Kent Kwik	1	17	0
Kenyon Oil Co.	North Grosvenordale, CT	Xtra Mart	7	127	0
Kerr-McGee Refining Corp.	Houston, TX	Kerr-McGee Food Shop	19	51	N/A
Kimber Petroleum Corp.	Madison, MJ	Kwik Pik/Mobil Mart	1	4	0
King & King Enterprises, Inc.	Claycomb, MO	King Super Store	3	30	0
Kocolene Oil Corp.	Seymour, IN	Kocolene Fuel/Food Mart	2	20	0
Krause Gentle Corp.	West Des Moines, IA	Kum & Go	6	140	0
Krist Oil Co.	Iron River, MI	Citgo Quik Food Mart	2	35	0
Kwickie Food Stores, Inc.	Macon, GA	Kwickie Food Store	1	52	0
Kwik King Food Stores	Ocala, FL	Kwik King Food Store	1	54	0
Kwik Sak	Columbia, TN	Kwik Sak	1	33	0
Kwik Shop, Inc.	Hutchinson, KS	Kwik Shop, Inc.	5	188	11
Kwik Trip, Inc.	Lacrosse, WI	Kwik Trip	3	218	0
Kwik Way, Inc.	Billings, MT	Kwik Way	1	0	0
Landhope Farms	Kennett Square, PA	Landhope Farms	3	18	0
Lassus Bros. Oil Inc.	Ft. Wayne, IN	Handy Dandy Food Store	1	20	0
LDD Corp.	Palmyra, NY	Palmart	1	8	0
Ledbetter Oil Co.	Marion, NC	Rainbow Pantries	1	6	9
Carols R. Leffler	Richland, PA	CR's Friendly Market	1	36	4
H.C. Lewis Oil Co.	Welch, WV	Kwik Serv Food Mart	1	5	0
Lindner Dairy Centers	Indianapolis, IN	Friendly Food Store	1	9	0
Lipscomb Oil Co., Inc.	Greenville, MS	Exxon Shoppe	2	16	0
Little Chef Stores	Jacksonville, FL	Little Champ Food Store	2	560	0
Little Food Town	Lakeland, FL	Little Food Town	1	3	0
Loaf N Jug	Pueblo, CO	Loaf N Jug	3	69	0
Lowes Food Stores Inc.	Winston-Salem, NC	Run-In Foods	1	21	0
The Lyden Co.	Youngstown, OH	Fast Check Food Mart	1	55	0
Lykins Oil Co.	Milford, OH	Lykins/Friends	2	6	3
Mapco Petroleum, Inc.	Tulsa, OK	Mapco Express/Delta Express	10	320	110
Marathon Oil Co.	Springfield, OH	Various	N/A	N/A	N/A
Maritime Energy Co.	Rockland, ME	Maritime Farms	1	5	0
Marsh Village Pantries, Inc.	Indianapolis, IN	Village Pantry	1	170	0
Martin & Bayley Inc.	Carmi, IL	Huck's Convenience Store	5	91	5

1989 Total	1990 Total	1991 Current	1991 Projected	Additions Projected in 1992	Number With Gasoline	Avg. Gasoline Volume Per Store Per Month		Size Sq. Ft	
						Mini	Full	Mini	Full
60	32	32	32	—	—	30,000	100,000	600/1,000	2,000
N/A	27	27	27	4–5	26	—	10,000/30,000	—	1,000+
8	10	11	11	—	—	N/A	N/A	200/600	1,400/3,000
N/A	19	18	?	?	14	N/A	N/A	N/A	N/A
35	35	24	24	5	24	N/A	50,000/75,000	800	2,500
N/A	20	20	22	?	19	—	?	—	2,000
22	22	22	24	2	22	—	106,000	—	1,400
1	2	2	2	0	2	110,000	100,000	500	1,000
N/A	N/A	29	N/A	N/A	29	—	N/A	—	N/A
2	3	2	2	2	2	—	N/A	—	2,000
15	16	17	17	1	16	N/A	N/A	800	2,500
N/A	20	23	25	2	23	60,000	50,000	900	1,300
22	22	20	20	0	20	—	N/A	—	1,500
23	24	36	38	3	37	—	N/A	—	1,800/2,000
220	220	192	?	?	20	—	N/A	—	1,000+
31	31	32	34	2	32	—	65,000	—	1,400
N/A	25	24	25	?	23	—	N/A	—	N/A
225	232	242	248	15	242	—	N/A	—	4,000
25	28	31	34	?	31	—	N/A	—	1,200
N/A	N/A	43	?	?	5	—	N/A	—	N/A
17	20	21	?	5	26	—	100,000	—	3,000
24	21	20	20	0	17	—	N/A	—	1,800
11	11	11	11	?	9	N/A	—	400	—
14	10	9	9	9	9	—	60,000	—	2,000
5	5	6	4	2	6	75,000	50,000	1,000	2,400
N/A	319	480	480	5–6	N/A	N/A	N/A	N/A	N/A
37	38	38	38	?	36	—	125,000	—	2,000
44	38	38	38	?	38	—	N/A	—	2,400
36	36	37	37	0	37	—	58,700	—	1,800/3,000
31	24	29	30–33	?	29	—	100,000	—	2,000
35	35	35	40	0	35	—	100,000	—	3,200
8	12	12	12	2	12	—	85,000	—	1,500
390	420	450	470	?	400	—	N/A	—	2,000/2,400
23	20	20	20	0	20	—	N/A	—	2,400
N/A	15	17	18	2	16	—	36,000	—	2,500
32	32	32	32	0	32	—	50,000	—	2,000
23	23	23	24	?	23	—	76,296	—	2,400
49	49	62	79	5	62	—	75,000	—	1,500
35	35	36	39	6	36	99,000	94,000	400	3,740
105	102	104	102	?	96	—	N/A	—	2,000
54	54	54	52	3	50	—	N/A	—	3,000
18	18	18	18	?	25	N/A	N/A	600	1,500/2,000
643	650	650	656	15	N/A	N/A	N/A	700	1,500
29	31	32	34	2	32	—	58,000	—	2,200
36	43	42	52	9	42	68,000	74,000	860	1,820
N/A	N/A	21	?	2	21	125,000	N/A	900	1,800
N/A	N/A	24	?	?	3	N/A	N/A	N/A	N/A
15	17	17	?	?	17	—	N/A	—	2,000
70	123	127	138	10	127	93,000	52,000	600	1,300
N/A	1,039	1,043	1,046	10	1,043	30,000	77,000	700	1,200
3	3	4	5	?	4	N/A	150,000	750	3,500
30	30	30	?	?	30	—	N/A	—	2,200
17	17	20	22	3	20	—	N/A	—	2,300
137	138	140	146	6–8	139	N/A	N/A	800/900	1,800
28	33	35	36	2	35	—	65,000	—	2,200
53	52	52	53	3–4	52	—	5,000	—	2,300
54	55	54	54	0	53	—	N/A	—	2,500
30	33	33	33	?	32	—	N/A	—	2,500
210	209	209	210	1	188	—	45,000	—	3,000
192	199	219	235	15	218	—	N/A	—	2,500
21	21	21	22	?	21	—	35,000	—	2,400
20	18	20	18	?	14	—	N/A	—	2,500
18	20	20	20	0	20	—	88,000	—	1,800
9	9	8	11	3	8	—	75,000	—	2,000
15	15	15	15	?	15	—	40,000	—	1,200
N/A	N/A	40	50	10	40	—	N/A	—	2,800
4	4	5	6	1	5	75,000	100,000	900	2,000
9	9	9	9	1	5	—	50,000	—	2,400
16	16	16	?		16	N/A	N/A	N/A	2,000
560	560	560	570	?	480	—	50,000	—	2,400
6	6	3	3	0	3	N/A	N/A	1,000	2,500
68	68	69	70	1	68	—	10,000/12,000	—	3,200
27	24	21	21	2	21	N/A	N/A	N/A	N/A
54	55	55	57	2	55	90,000	60,000	800	1,500
7	7	9	10	1	9	—	85,000	—	2,000
310	316	320	322	3	320	92,000	90,000	650	2,000
N/A	N/A	408	413	?	408	N/A	N/A	800	1,000+
N/A	5	5	5	0	5	40,000	75,000	800	2,400
168	168	170	175	?	111	—	N/A	—	2,690
95	105	96	100	6	86	—	48,000	—	2,500

C-Store Summary (Cont.)

Company	H.Q. Location	C-Store Name	No. of States Where Stores Are Located	Company Operated	Franchise Operated
Martin Oil Co.	Bellwood, PA	Minit Mart	1	18	0
Martin Oil Marketing, Ltd.	Alsip, IL	Martin Mini Food Mart	2	43	0
Maverick Markets, Inc.	Corpus Christi, TX	Maverick Market	1	110	0
Maveric Mini Marts	Cushing, OK	Maveric Mini Marts	1	23	0
Maverik Country Stores, Inc.	Afton, WY	Maverik Country Stores, Inc.	8	112	0
May-Slade Oil Co.	Klamath Falls, OR	Food Mart	1	4	3
McDowell Oil Service, Inc.	Milton, PA	Time Markets, Inc.	1	28	0
McGuire Oil Co.	Mobile, AL	McGuire Food Marts, Inc./ Com Pac Food Store	1	18	0
McLeieer Oil Service, Inc.	Kalamazoo, MI	Food Port Marketing	1	3	0
Mercer's Kwik Stop Food Stores	Boonville, NY	Bonfare	2	49	11
Merritt Truax, Inc.	Salem, OR	Texaco	1	5	0
Metzger Dairies, Inc.	Dallas, TX	Mr. M Food Store	1	47	0
Mickey's Enterprises, Inc.	Killeen, TX	Mickey's Convenience Store	1	16	0
Mid-Continent Systems, Inc.	West Memphis, AR	Convenience Market	2	0	26
Mid-Missouri Oil Co.	Kaiser, MO	Jiffy Stop	1	0	6
Mid South Sales, Inc.	Helena, AR	Citgo Food Mart	1	14	0
Midstate Oil Co.	Columbia, MO	Breaktime	1	64	0
Mid-States Petroleum	Troy, MI	Mid-Mart	3	39	0
Mid-West Petroleum Inc.	Derby, KS	Stop 2 Shop	3	10	35
Midwest Industrial Foods	Lacrosse, WI	Quik-Stop	2	0	30
Midwest Petroleum Co.	St. Louis, MO	Sulch Oil Co./Express Lane	2	56	0
Miller & Holmes, Inc.	St. Paul, MN	MH	6	N/A	N/A
Miller Enterprises Inc.	Crescent City, FL	Handy Way Food Store	1	128	0
Miller Oil Co.	Norfolk, VA	Miller Mart	2	N/A	N/A
Mini Mart Inc.	Casper, WY	Mini Mart, Inc.	6	106	0
Mini Marts	Bellwood, PA	Mini Marts	1	30	0
Minit Mart Foods, Inc.	Bowling Green, KY	Minit Mart	2	98	0
Minit Mart, L.P.	Vancouver, WA	Quick Shop Minit Mart Food Store	2	2	48
Minit Stop, Inc.	Bay Minette, AL	Minit Stop, Inc.	1	10	0
Mobil Oil Corp.	Fairfax, VA	Mobil Mart	19	551	616
Modern Oil Co., Inc.	Shawnee, OK	Kwick Stop Food Mart	1	26	0
Mooney Oil Corp.	Lansing, MI	Superstop	1	19	0
Moore Petroleum	Banta, CA	Exxon Food Mart	1	0	3
Mountain Empire Oil Co.	Johnson City, TN	Roadrunner Market	3	32	0
Moyle Petroleum Co.	Rapid City, SD	Common Cents Food Store	1	30	0
Mr. Zip Convenience Stores, Inc.	Cleveland, TN	Mr. Zip/Classic Group	3	50	0
Munro Petroleum & Terminal Corp.	Biloxi, MS	MP Stores	1	11	0
Murphy Oil USA, Inc.	El Dorado, AR	SPUR	12	0	156
Musket Corp.	Oklahoma City, OK	Love's Country Store/Love's Travel Stop	6	127	0
National Convenience Stores, Inc.	Houston, TX	Stop N Go	3	982	0
National Oil & Gas, Inc.	Bluffton, IN	Deli Mart	2	40	0
Neal, Inc.	San Antonio, TX	One Stop Food Store	1	24	0
Nella Oil Co.	Auburn, CA	1-Stop Convenience Food Store	2	24	0
Nelson's Oil & Gas, Inc.	Edgemont, SD	Nelson's Kountry Korner	3	3	2
Nice N Easy Grocery Shoppes, Inc.	Canastota, NY	Nice N Easy Shoppe	1	18	67
Northville Industries Corp.	Melville, NY	Snaxville	1	6	0
Nugget Oil, Inc.	Crestview, FL	Nugget Oil Inc.	1	46	0
Omega Oil Co.	Dayton, OH	Omega Mart	2	58	0
Open Pantry Food Marts	Racine, WI	Your Open Pantry	2	22	37
Orloski's Service Stations, Inc.	Wilkes-Barre, PA	Orloski's Quik Mart	1	0	0
Otto Energy, Inc.	Shreveport, LA	Otto's Food Store	1	7	0
Pacific Northern Oil Co.	Seattle, WA	Panoco	1	2	0
Pacific Petroleum Corp.	Eugene, OR	Tiger Mart	1	1	—
Pack & Sack Food Centers, Inc.	Cairo, GA	Pack & Sack Food	2	0	0
The Pantry Inc.	Sanford, NC	The Pantry	4	N/A	N/A
The Pantry Store Inc.	Clarksburg, WV	The Pantry Store Inc.	2	28	0
Parker Oil Co., Inc.	South Hill, VA	Petrol/Red Barn	2	2	28
Parman Oil Co.	Nashville, TN	Par Mart	1	19	0
Patterson Oil Co., Inc.	Torrington, CT	Patco Handy Stop	1	9	0
Pay Less Oil Co.	Tampa, FL	Pay Less/Ready	1	21	0
Pay N Save Inc.	Littlefield, TX	Jolly Roger	2	14	0
PDQ Food Stores, Inc.	Middleton, WI	PDQ Food Store, Inc.	4	87	0
Petroleum Marketers, Inc.	Roanoke, VA	Stop In Food Store	2	50	0
Petroleum Marketing Co.	Tulsa, OK	7-Eleven	6	0	20
Petroleum Sales & Service	Buffalo, NY	Petro USA	1	4	0
Petroleum World, Inc.	Spartansburg, SC	Express Store	2	34	0
Phillips 66 Co.	Bartlesville, OK	Phillips 66	N/A	N/A	N/A
Piasa Motor Fuels, Inc.	Alton, IL	Piasa Pantry	2	4	4
Pick Kwik Food Stores, Inc.	Tampa, FL	Pick Kwik	1	92	0
Pilot Corp.	Knoxville, TN	Pilot Foodmart/Pilot Travel Center	27	88	0
Pipeline Oil Sales	Jackson, MI	Buddy's Mini-Marts, Inc.	1	25	1
Plaid Pantries, Inc.	Beaverton, OR	Plaid Pantries Inc.	2	105	0
Poole Oil Co.	Ontario, OR	Poole's Country Store	2	2	0
Presta Oil Inc.	Garden City, KS	Dart In/Presto	1	17	2
Presto Food Stores, Inc.	Plant City, FL	Presto Food Stores	1	63	0
Private Brand Services, Inc.	Cadillac, MI	P.B.S. Party Store	1	1	0
Purity Oil Co.	Tulsa, OK	Fastop Stores	1	13	0
Q-Mart Food Stores of America	Jackson, TN	Q-Mart	1	7	12
Q-Midwest	Mound, MN	Total Mart	1	6	0

1989 Total	1990 Total	1991 Current	1991 Projected	Additions Projected in 1992	Number With Gasoline	Avg. Gasoline Volume Per Store Per Month		Size Sq. Ft	
						Mini	Full	Mini	Full
N/A	N/A	18	18	7	18	—	N/A	—	N/A
41	43	43	43	6–8	43	130,000	160,000	400	2,400/3,200
111	110	110	120	?	95	—	75,000	—	2,400
26	24	23	23	?	22	—	45,000	—	1,400
98	109	112	115	?	111	—	65,000	—	2,000
6	6	7	—	1	7	40,000	105,000	900	1,100/1,500
30	28	28	28	0	28	—	70,000	—	2,100
22	22	18	18	?	18	—	50,000	—	1,500
2	3	3	3	?	3	—	75,000/80,000	—	3,000/4,000
56	58	60	60	0	48	—	40,000	—	3,000
6	5	5	6	0	5	—	125,000	—	N/A
48	48	47	48	?	38	—	N/A	—	2,300
21	21	16	17	?	16	—	N/A	—	2,300
32	N/A	26	26	0	22	—	20,000	—	2,000
8	6	6	6	?	6	—	60,000	—	1,000+
10	14	14	15	2	14	—	N/A	—	2,200
63	63	64	66	?	64	50,000	50,000	800	1,400
39	39	39	39	3–5	37	120,000	120,000	800	1,600
40	45	45	50	5	45	—	50,000	—	2,400
0	30	30	33	2–3	30	—	50,000	—	1,800
53	57	56	57	?	56	60,000	60,000	1,000	1,500
N/A	N/A	24	N/A	N/A	24	N/A	N/A	N/A	N/A
129	125	128	130	5	112	—	50,000	—	2,400
21	35	41	?	?	41	N/A	N/A	N/A	N/A
117	117	106	108	2	118	—	45,000	—	2,400
N/A	30	30	30	0	30	40,000	50,000	1,000	2,000
98	97	98	99	2–3	96	—	44,000	—	3,000
52	51	50	50	0	17	—	50,000	—	2,800
10	10	10	?	?	10	—	100,000	—	2,400
800	N/A	1,167	1,207	?	1,167	N/A	N/A	960	1,000
N/A	N/A	26	26	?	26	—	N/A	—	1,000+
18	19	19	2	2	19	—	90,000	—	2,300
3	3	3	5	1	3	80,000	160,000	200	2,400
35	35	32	41	?	32	60,000	60,000	200	2,000
30	30	30	?	?	30	—	N/A	—	2,500
50	50	50	52	?	50	—	N/A	—	1,000+
9	10	11	2	1	11	—	60,000	—	1,200/1,400
119	156	156	?	?	156	—	N/A	—	1,200
119	123	127	131	7	127	—	100,000	—	3,500
1,099	1,091	989	989	0	809	N/A	N/A	800	2,700
28	28	40	46	6	40	50,000	50,000	1,000	2,000
25	25	24	25	2	24	—	42,500	—	1,750
27	24	24	25	3	24	185,000	185,000	800	1,800
7	7	7	8	?	7	—	50,000	—	2,800
N/A	N/A	85	85	?	85	N/A	N/A	N/A	N/A
0	0	6	6	2–3	6	—	60,000	—	1,800
44	44	46	47	0	46	—	40,000/125,000	—	1,600/2,400
57	57	58	59	2	58	N/A	N/A	600	1,200
61	60	59	59	2	31	—	70,000	—	2,400
32	34	34	35	?	33	80,000	80,000	700	1,400
4	6	6	7	?	7	—	N/A	—	1,000
2	2	2	2	1–5	2	—	125,000	—	2,800
—	—	4	1	2	1	—	290,000	—	1,600
45	48	46	46	2	46	—	15,000	—	2,400
N/A	N/A	448	450	0	427	—	N/A	—	2,400
N/A	27	28	30	2	27	—	50,000	—	1,500
30	28	30	?	?	30	—	50,000	—	1,800
18	20	19	?	?	19	—	150,000	—	2,500
7	9	9	10	1	9	57,000	70,000	800	1,600
21	22	21	?	?	21	—	N/A	—	1,000+
N/A	N/A	14	N/A	N/A	14	N/A	N/A	N/A	N/A
105	99	87	88–90	?	67	N/A	N/A	N/A	N/A
54	50	50	55	10	50	78,000	110,000	1,000	1,800
111	96	97	96	0	97	N/A	N/A	N/A	N/A
3	4	4	6–7	?	4	80,000	—	600/700	—
N/A	27	34	34	?	34	N/A	N/A	N/A	N/A
159	190	213	?	?	213	N/A	N/A	N/A	N/A
4	6	8	9	1	8	—	60,000	—	2,200
94	92	89	87	4	67	—	48,000	—	2,200
81	85	88	4–5	?	88	—	N/A	—	1,500/6,000
25	28	30	33	?	30	51,000	63,000	750	1,400
124	110	105	105	?	14	—	75,000	—	2,400
4	5	5	—	—	5	—	50,000	—	1,800/2,500
15	21	19	21	2	19	59,000	47,000	225	2,400
58	62	63	?	?	62	30,000	30,000	N/A	2,400
1	1	1	1	0	1	—	140,000	—	3,000
10	13	13	13	?	N/A	80,000	N/A	800	N/A
N/A	19	19	20	N/A	19	—	40,000	—	2,400
3	6	6	8	2	6	—	80,000	—	2,400

C-Store Summary (Cont.)

Company	H.Q. Location	C-Store Name	No. of States Where Stores Are Located	Company Operated	Franchise Operated
Quality Oil Co. Inc., Ltd. Partnership	Winston-Salem, NC	Quality Mart	2	28	0
Quarles Petroleum, Inc.	Fredericksburg, VA	Q-Stop Food Store	1	15	0
Quality Petroleum Corp.	Lakeland, FL	Hop-N-Save	2	30	20
Quick Chek Food Stores Inc.	White House Station, NJ	Quick Chek	1	95	0
Quick 'N Easy Stores, Inc.	Austell, GA	Quick 'N Easy Store	1	18	0
Quick-Sav, Inc.	Flushing, MI	Quick-Sav, Inc.	1	29	0
Quick Stop Food Mart, Inc.	Fayetteville, NC	Quick Stop Food Mart	2	80	0
Quik Mart Stores	Billings, MT	Quik Mart	1	4	0
Quik Mart Stores, Inc.	Tucson, AZ	Quik Mart Store	1	24	0
Quik Thrift Food Stores, Inc.	Marietta, GA	Quik Thrift	1	14	0
QuikTrip Corporation	Tulsa, OK	QuikTrip	6	284	0
Qwik Korner Deli-Grocery, Inc.	San Marcos, CA	Qwik Korner Deli Grocery	1	7	0
Qwik Stop	Coeur D'Alene, ID	Qwik Stop	1	3	0
Racetrac Petroleum, Inc.	Atlanta, GA	Racetrac Raceway	12	175	139
Rainbo Oil Co.	Salt Lake City, UT	Rainbo Mart	1	38	0
Ram Oil Corp.	San Antonio, TX	Ram Store	1	13	0
Red Hed Oil Co., Inc.	Richmond, KY	Redi Mart	1	8	0
Red Rock Distributing	Oklahoma City, OK	Save-A-Stop/Fuel-at-the-Flag	1	19	0
Republic Oil Corp.	Woodland Hills, CA	Dixxie Mart	N/A	N/A	N/A
Retail Marketing Co.	Tulsa, OK	7-Eleven	6	77	20
Rinehart Oil Inc.	Ukiah, CA	R-Mart/RINO	1	6	0
River Oil Co.	Memphis, TN	Phillips 66 C-Store	1	3	0
F.L. Roberts	Springfield, MA	Roberts Food Mart	2	24	0
Robinson Oil Co., Inc.	San Jose, CA	Mrs. Robbie's Foodstore/ Mrs. Robbie's Snackspot	1	8	0
Rocky Top Markets, Inc.	Harriman, TN	Rocky Top Market	1	N/A	N/A
Royster Oil Co., Inc.	Shelby, NC	RoCo Food Store	1	1	0
Russ Day-N-Nite Markets, Inc.	Albany, OR	Russ' Day-N-Nite	1	14	0
Russel Petroleum Corp.	Montgomery, AL	Kwik Shop Food Store	1	17	0
Sac N Pac Stores	San Marcos, TX	Sac N Pac	1	20	N/A
Sahara Oil Co., Inc.	Phoenix, AZ	Rebel Quik Mart	1	8	0
Santee Oil Co., Inc.	Kingstree, SC	Carolina Shell/Georgetown Shell Pawley Island Shell/Hemingway Shell	1	4	0
Satco	Newport, ME	Satco	1	18	3
Sav A Step Food Marts, Inc.	Louisville, KY	Sav-A-Step Food Mart	2	22	4
Save-A-Stop, Inc.	Oklahoma City, OK	Save-A-Stop	1	19	0
Sav-A-Trip, Inc.	Cherokee, OK	Sav-A-Trip, Inc.	2	19	0
Save-X, U.S.A., Inc.	Roanoke, VA	Save-X Mini Mart	1	10	0
Savings Station Dodges Store	Tupelo, MS	Dodges Stores	10	10	—
SBR, Inc.	Parkersburg, WV	7-Eleven	2	63	0
Scaff's Inc. dba S & S Foods	Lakeland, FL	S&S Food Stores	1	35	0
SCASCO	Winsted, CT	Nutmeg Pantry	1	0	10
Schaeffer Oil Inc.	Winner, SD	"Lil Feller"	2	6	0
Schierl Sales Corp.	Stevens Point, WI	The Store	2	23	0
Schmuckal Oil Co.	Traverse City, MI	Shell Mini-Mart	1	18	0
Carl M. Schultz Inc.	LaPeer, MI		1	N/A	N/A
Sears Oil Co., Inc.	Rome, NY	Seaco Express Shop	1	9	1
Sessoms Properties, Inc.	St. Pauls, NC	Kwik Shop/Petro Mart	1	12	0
7 2 11 Food Stores	Farmington, NM	7 2 11 Food Store	3	N/A	N/A
Shay Oil Co., Inc.	Yuma, AZ	Shay's Mart	1	11	0
Sheetz, Inc.	Altoona, PA	Sheetz Inc.	4	160	0
Sheffield Oil Co.	Dothan, AL	Sheffield Oil Co.	3	22	0
Shell Oil Co.	Houston, TX	Shell Food Mart	22	N/A	N/A
Shipley Oil Co.	York, PA	N/A	1	N/A	N/A
Shirtcliff Oil Co.	Myrtle Creek, OR	Food Mart/Deli Mart	1	2	0
Shop A Snak Food Marts, Inc.	Birmingham, AL	Shop-A-Snack Food Mart	1	24	0
Shop Rite, Inc.	Crowley, LA	Shop Rite	1	42	0
Short Stop Food Marts	Fayetteville, NC	Short Stop/Easy Stop 66/Food Mart	1	66	0
SICO	Mount Joy, PA	SICO Serve	3	8	0
Silcorp Ltd.	Mississauga, Ont. Can	Mac's/Hop In/Mike's Mart	1	N/A	N/A
Sinclair Oil Corp.	Salt Lake City, UT	Sinclair Service Sations	14	220	80
Sing Oil Co.	Thomasville, GA	Sing Food Stores	5	56	0
Site Oil Co.	St. Louis, MO	Site Food Mart	8	50	0
6-Twelve Convenience Mart Inc.	Gaithersburg, MD	6-Twelve Convenience Mart	2	7	20
Skinny's, Inc.	Abilene, TX	Skinny's	1	49	0
R.L. Smeltz Oil Co., Inc.	Greensburg, PA	R.L. Smeltz Oil Co.	1	10	0
Southern Counties Oil Co.	Orange, CA	Southern Counties Oil Co.	1	5	0
Southern Food Park, Inc.	Sparta, IL	Han-Dee Mart	1	16	0
Southern Oil Co., Inc.	Suffolk, VA	Southern Food Stores	1	6	0
The Southland Corp.	Dallas, TX	7-Eleven/High's Quick Mart	30	1,704	4,239
Spectrum Stores	West Point, GA	Spectrum Store	2	0	0
The Spencer Co., Inc.	Huntsville, AL	Minit Man	1	14	24
Spies Corp.	Watertown, SD	Cowboy Convenience Store	1	1	0
Stallings Oil Co.	Rocky Mount, NC	Zipmart	2	41	0
Star Development Holding	Melburne, FL	Town Star Foods	1	30	0
Star Enterprise	Houston, TX	Texaco Food Mart	26	658	4,739
Star Oil Co.	Port Huron, MI	Plums	1	4	0
Sterling Milk Co.	Wauseon, OH	Sterling Food Store	2	28	0
Steuart Petroleum Co.	Washington, DC	Agip/Happy Store	6	60	3
Stewart Oil Co./Tri-Star Marketing	Urbana, IL	Super Gas/Super Pantry Store	2	39	0

1989 Total	1990 Total	1991 Current	1991 Projected	Additions Projected In 1992	Number With Gasoline	Avg. Gasoline Volume Per Store Per Month		Size Sq. Ft	
						Mini	Full	Mini	Full
27	26	28	29	1	28	100,000	100,000	200	2,200
43	47	50	50	?	50	—	68,000	—	1,600
11	14	15	17	2	15	—	50,000	—	2,400
92	95	95	98	?	0	—	N/A	—	3,100
22	18	18	18	0	18	—	50,000	—	3,000
27	29	29	30	?	29	—	63,000	—	1,800
83	80	80	82	3	80	—	50,000	—	2,400
6	6	4	4	?	4	N/A	N/A	N/A	N/A
25	25	24	25	?	22	—	N/A	—	2,400
12	14	14	14	0	8	—	95,000	—	1,500
255	268	284	314	30	277	—	N/A	—	3,200
24	23	7	7	0	2	—	61,000	—	1,200
0	0	3	8	5	3	—	N/A	—	3,000
268	314	259	340	20-35	314	N/A	N/A	800	3,500
37	39	37	?	?	38	—	N/A	—	1,800
9	11	13	15	?	13	—	N/A	—	N/A
6	6	8	8	1	8	55,000	70,000	600	2,50
22	22	19	19	0	19	50,000	50,000	600	2,500
4	4	4	N/A	N/A	N/A	N/A	N/A	N/A	N/A
111	100	97	97	0	96	—	51,000	—	2,400
6	6	5	6	—	—	34,000	100,000+	300	1,200
3	3	3	3	0	3	—	90,000	—	2,000
N/A	24	24	24	0	24	70,000	100,000	800	1,400
7	8	8	9	?	8	N/A	N/A	600	1,350
N/A	24	25	?	?	25	N/A	N/A	N/A	N/A
1	1	1	1	1	1	—	130,000	—	2,500
22	20	14	11	0	1	—	N/A	—	2,000
17	19	17	19	2-3	17	N/A	N/A	900	2,400
N/A	N/A	20	N/A	N/A	20	N/A	N/A	N/A	N/A
6	7	8	11	2	9	—	100,000	—	3,200
4	4	4	4	?	4	—	222,000	—	2,000
N/A	27	21	21	0	21	—	55,000	—	1,200
N/A	24	26	27	5	24	—	N/A	—	3,000
23	21	19	19	0	19	N/A	N/A	1,000	2,000
18	19	19	19	1	19	—	50,000	—	1,800
9	10	10	11	1	10	N/A	N/A	1,000	2,200
N/A	N/A	60	N/A	N/A	60	—	N/A	—	N/A
63	63	63	65	?	51	—	N/A	—	2,500
37	37	35	36	1	35	—	80,000	—	2,700
8	10	10	11	1	10	—	75,000	—	1,800
6	6	6	?	?	6	—	N/A	—	2,500
21	22	23	23	0	23	—	60,000	—	2,300
16	16	18	19	2	18	—	95,000	—	2,400
N/A	N/A	24	N/A	N/A	24	—	N/A	—	N/A
3	10	10	N/A	N/A	10	N/A	N/A	250	2,500
17	14	12	13	0	11	—	N/A	—	N/A
N/A	N/A	30	N/A	N/A	N/A	N/A	N/A	N/A	N/A
11	11	11	12	1	11	100,000	125,000	800	2,500
146	152	160	170	12	158	—	80,000	—	2,700
20	22	24	26	?	24	40,000	—	800	—
1,164	1,300	1,300	?	?	1,300	N/A	N/A	800	1,000/2,600
N/A	N/A	20–25	N/A	N/A	20–25	N/A	N/A	N/A	N/A
2	2	2	3	—	2	—	100,000	—	2,400
N/A	21	22	22	?	22	—	50,000	—	2,400
38	41	42	44	?	42	—	N/A	—	2,400
N/A	66	62	66	?	58	—	N/A	—	N/A
7	8	8	8	2	8	104,000	199,000	650	1,200
1,130	999	999	?	?	197	—	N/A	—	2,400
N/A	N/A	300	N/A	N/A	N/A	N/A	N/A	N/A	N/A
54	54	56	56	?	56	N/A	N/A	—	3,000
N/A	50	50	?	?	50	N/A	N/A	—	2,500
N/A	23	27	32	?	8	—	80,000	—	3,000
50	52	49	47	2	49	—	29,000	—	2,400
4	4	10	12	2	10	100,000	175,000	1,000	2,400
3	4	5	7	0	4	150,000	—	650	—
16	16	16	16	1-2	16	—	50,000	—	2,500
5	5	6	6	1	6	—	80,000	—	1,800
7,097	6,190	5,943	?	0	2,534	—	46,000	—	2,800
40	42	42	42	0	42	—	70,000	—	2,400
N/A	30	33	38	0	38	—	55,000	—	N/A
1	1	1	1	0	1	—	60,000	—	5,000
45	43	41	44	?	42	N/A	125,000	1,000	1,500
N/A	31	30	?	?	?	—	N/A	—	N/A
N/A	5,397	5,397	5,350	244	5,311	85,000	102,000	700	1,500
N/A	N/A	4	?	1	4	—	200,000	—	1,500
N/A	28	28	28	?	11	—	N/A	—	2,400
21	59	63	65	16	63	145,000	168,000	600	1,800
N/A	20	39	24	3	39	N/A	N/A	700	1,800

C-Store Summary (Cont.)

Company	H.Q. Location	C-Store Name	No. of States Where Stores Are Located	Company Operated	Franchise Operated
Stewarts Ice Cream Co.	Saratoga Springs, NY	Stewarts Ice Cream	2	181	0
Stop In Food Stores, Inc.	Roanoke, VA	Stop-In Food Stores	2	51	0
Stop-N-Go of Madison, Inc.	Madison, WI	Stop-N-Go	2	47	0
The Store 24, Inc.	Waltham, MA	The Store 24, Inc.	5	109	0
J.D. Streett & Co., Inc.	Maryland Heights, MO	FINA/Citgo/Sunoco	4	14	0
Strassburger Enterprises	Temple, TX	Pay Less/Quix	1	29	0
Sugar Creek Stores, Inc.	Rochester, NY	Sugar Creek Store	1	98	5
Sunglo, Inc.	San Antonio, TX	Sunglo, Inc.	1	24	0
Sun Refining and Marketing Co.	Philadelphia, PA	Stop-N-Go	27	N/A	N/A
Sunny Side Farms Stores	Moosup, CT	Sunny Side Farms Store	1	10	0
Sunshine Jr. Stores, Inc.	Panama City, FL	Jr. Food Stores	5	296	0
Suwannee Swifty Stores, Inc.	Quitman, GA	Beacon/Ultramart/Suwannee Swifty	3	212	0
Sweeney Co., Inc.	Chicago, IL	Sweeney Foods Works	1	6	0
T & E Oil Co.	Hutchinson, KS	Food Plaza and Mini Mart	1	9	0
Target Captial Div.	Seattle, WA	Express Lane	2	0	20
Tattnal Foods, Inc.	Glennville, GA	Wollard's Blanch	1	26	0
Taylor Food Marts	Amarillo, TX	Taylor Food Mart	5	112	0
Taylor Oil Co.	Winston-Salem, NC	Etna Food Store	2	60	0
Tedeschi's Food Stores	Rockland, MA	Tedeschi's Food Store	2	67	0
Tesoro Petroleum Corp.	Anchorage, AK	North Stores 7-Eleven	1	39	0
Texaco Refining & Marketing Inc.	Houston, TX	Texaco/Star Mart/Food Mart	14	471	0
TFM Co.	Dubuque, IA	Oky Doky	3	1	18
Thomas Oil Co.	Bryant, AR	Tommys-A-Tanks/Kountry Junction/ Miliary 66/2 Chief Truck Stop	1	5	0
Thornhill Oil Co., Inc.	Ft. Wayne, IN	Amoco Food Shop	1	15	1
Thornton Oil Corp.	Louisville, KY	Thornton's Gas and Food Mart	6	102	4
Thrifty Oil Co.	Downey, CA	Thrifty Food & Gas	1	151	0
Thriftway Marketing Corp.	Farmington, NM	Thriftyway Marketing	4	71	0
Time Oil Co.	Seattle, WA	Jackpot Food Mart	5	111	58
Time Saver Stores, Inc.	New Orleans, LA	Time Saver Stores, Inc.	1	133	0
TOC Retail Inc.	Casselberry, FL	Majik Market	11	389	0
Tom Thumb Food Markets, Inc.	Crestview, FL	Tom Thumb	2	104	0
Tooley Oil Co.	Sacramento, CA	Shell Food Mart/Tooley's Mart	1	6	0
Total Petroleum, Inc.	Denver, CO	Total Mart/V Mart/Road Runner	18	614	13
Total Road Runner, Inc.	Texar Kana, TX	Road Runner	5	130	0
Town & Country Food Marts	Wichita, KS	Town and Country Markets	4	66	0
Town & Country Food Stores	Melbourne, FL	Town Star Food Store	1	30	0
Town Pump	Butte, MT	Town Pump Food Store	1	38	23
Town Star Food Stores, Inc.	Melbourne, FL	Town Star Food Store	1	31	0
Travelers Petroleum, Inc.	Anderson, SC	Self Way	1	N/A	0
Trejo Oil Co.	Casa Grande, AZ	Tiger Mart/Short Stop	1	25	0
Tri-Valley Distributors Inc.	Heber City, UT	Tri-Mart	6	40	0
Triton, Inc.	Atlanta, GA	Happy Store	3	21	0
Twin Lakes Petroleum Corp.	Athens, TX	Twin Stop	1	7	0
Ultramar, Inc.	Hanford, CA	Ultramart	2	178	24
Ultra Power Corp.	Monticello, NY	Ultra Mart	1	4	0
Uni-Marts, Inc.	State College, PA	Uni-Marts, Inc.	5	315	25
United Dairy Farmers	Cincinnati, OH	United Dairy Farmers	3	214	0
United Refining Co. of PA	Warren, PA	Kwik Fill/Red Apple Food Mart	3	193	0
UNOCAL Refining & Marketing Div.	Los Angeles, CA	Self Serve Mart	13	N/A	N/A
U.S.A. Petroleum	Santa Monica, CA	USA Mini Mart	5	29	0
Venta, Inc.	Denver, CO	Conveniencs Plus	4	44	0
Verona Oil Co., Inc.	Roscoe, NY	The Country Store	1	24	0
Vista Marketing Group., Ltd.	Rockford, IL	Vista	2	0	6
Waco Oil Co.	Louisville, KY	Waco Food Mart	2	13	0
Wades Foods, Inc.	Christiansburg, VA	Deli Mart & Food Time	1	21	0
Wake Up Oil Co., Inc.	Indianapolis, IN	Mini Snack Shop	1	5	0
Walters Dimmick Petroleum	Marshall, MI	Speed-D Mart	3	37	0
Warelubco, Inc.	Jacksonville, IL	Wareco Country Store	5	67	0
Warren Equities, Inc.	New York, NY	Xtra Mart	7	127	0
Warring Oil Co.	Jackson, MS	Interstate Food Stop	2	27	0
Wawa, Inc.	Wawa, PA	Wawa Food Market	5	485	0
Webster Oil Co.	Springfield, MO	E.J.'s	1	4	0
Weigels Farm Stores	Powell, TN	Weigel's Farm Store	1	38	0
Welsh Oil Co.	Merrillville, IN	All different	2	21	0
West Lynn Creamery	Lynn, MA	Richdale Dairy Stores, Inc.	2	25	25
West Star Corp.	Olympia, WA	Northwest Deli Mart	1	9	0
West Texas Gas Inc.	Midland, TX	Friend's/Various	1	12	5
Western Energetics Corp.	Reno, NV	Exxon Winner's Corner	1	20	0
Western Marketing, Inc.	Abilene, TX	Wes-T-Go, Inc.	2	15	0
Westgate Oil Co.	Muskegon, MI	Wesco	1	30	0
Westland Enterprises	Atkinson, NE	Mr. G's	2	N/A	N/A
A.T. Williams Oil Co.	Winston-Salem, NC	Wilco Food Mart	2	100	0
J.H. Williams Oil Co., Inc.	Tampa, FL	76 Mini-Mart	1	85	—
Williamson Oil Co.	Fort Payne, AL	Discount Food Mart	3	85	0
The Willis Group, Inc.	La Plata, MD	Dash-In Food Store	3	44	0
Wind River Petroleum	Salt Lake City, UT	Top Store Circle C	1	25	0
Wooten Oil Co.	Goldsboro, NC	Kwik Mart	1	20	0
Younger Oil Co.	Albany, OR	Time Out	1	2	0

1989 Total	1990 Total	1991 Current	1991 Projected	Additions Projected in 1992	Number With Gasoline	Avg. Gasoline Volume Per Store Per Month		Size Sq. Ft	
						Mini	Full	Mini	Full
N/A	176	181	184	8	159	—	43,000	—	2,500
51	50	51	52	?	51	—	125,000	—	N/A
54	58	47	47	3	35	—	60,000	—	2,400
N/A	108	109	?	?	1	—	N/A	—	N/A
13	13	14	?	?	14	N/A	N/A	500	1,500
94	94	29	31	?	27	—	100,000	—	2,000
100	103	103	110	10	98	N/A	60,000	700	1,800
25	24	24	24	?	24	—	300,000	—	1,000
620	510	786	?	?	—	—	N/A	—	N/A
N/A	10	10	10	1–2	6	30,000	60,000	800	1,200
315	297	296	300	10	291	—	30,000	—	2,400
N/A	191	212	220	5–10	N/A	—	N/A	—	2,400
6	6	6	7	0	6	—	100,000	—	1,600
9	9	9	10	1	9	N/A	N/A	1,000	2,400
40	20	20	20	2	20	—	100,000	—	2,000
N/A	26	26	?	?	26	N/A	N/A	N/A	N/A
125	118	112	112	0	112	N/A	N/A	500	2,400
55	57	60	62	2–3	60	114,000	114,000	900	2,400
N/A	64	64	67	2–3	2	N/A	N/A	N/A	N/A
41	41	39	41	2	32	—	55,000	—	2,200
N/A	454	471	496	42	471	—	115,000	—	N/A
19	19	19	19	0	N/A	N/A	N/A	N/A	N/A
5	5	5	5	0	5	—	80,000	—	3,000
8	15	16	16	2	9	90,000	100,000	900	1,400
75	89	106	106	15	106	—	N/A	—	2,400
N/A	134	151	156	13	150	100,000	51,000	1,000	2,000
63	70	71	71	?	71	N/A	N/A	1,000	2,200
173	170	169	174	10	169	—	133,000	—	2,400
136	136	133	136	3	113	—	3,200	—	2,310
388	389	389	391	0	320	N/A	N/A	N/A	N/A
N/A	104	104	108	0	94	—	N/A	—	N/A
8	6	6	7	?	6	175,000	240,000	200/800	2,000
534	630	627	697	12	627	120,000	150,000	670	1,900
100	120	130	135	3	130	—	150,000	—	2,000
N/A	66	66	?	?	66	—	N/A	—	2,400
33	31	31	30	2	22	—	50,000	—	2,400
52	60	61	?	?	61	N/A	N/A	—	N/A
31	31	31	31	2	21	—	50,000	—	2,400
N/A	N/A	N/A	N/A	0	N/A	—	N/A	—	1,000
25	25	25	28	4	25	20,000	30,000	2,000	2,000+
37	39	40	40	2	40	N/A	N/A	1,000	1,600/2,000
N/A	59	21	25	?	21	N/A	—	—	1,800
4	6	7	9	?	7	—	N/A	—	1,000
114	202	202	232	30	202	122,000	155,000	800	1,500
4	4	4	7	2	4	25,000	60,000	500	2,000
342	339	340	342	?	205	—	34,000	—	2,500
214	214	214	230	20	130	—	N/A	—	3,200
110	192	193	194	5	189	80,300	70,200	800	1,000
2,500	1,924	2,188	N/A	N/A	N/A	N/A	N/A	500/1,000	2,200
N/A	11	29	30	2	29	150,000	150,000	900	2,000
43	44	44	45	?	44	—	78,000	—	1,800
22	23	24	24	0	24	—	42,000	—	1,500
5	6	6	7	?	16	—	150,000	—	2,000
13	13	13	13	?	13	N/A	N/A	N/A	N/A
18	18	21	21	2	9	—	N/A	—	N/A
5	5	5	5	2	5	100,000	100,000	400	2,500
39	39	37	37	0	37	N/A	N/A	1,000	2,500
72	62	67	74	?	67	N/A	N/A	900	2,400
71	123	127	134	11	127	93,000	52,000	600	1,300
22	N/A	27	27	1	27	—	N/A	—	2,800
465	483	485	490	?	8	—	N/A	—	3,200
11	11	4	4	0	4	N/A	N/A	900	2,400
35	37	38	40	2	36	N/A	N/A	900	2,200
28	20	21	24	3	21	—	N/A	—	1,700
54	50	50	52	2	21	—	50,000	—	2,000
9	9	9	9	?	9	—	40,000	—	2,000
11	15	17	19	3	17	N/A	N/A	N/A	2,200
14	17	20	22	2	20	—	175,000	—	2,400
11	12	15	15	5	15	—	65,000	—	1,600
28	30	30	31	1	30	125,000	125,000	1,000	2,000
24	24	25	?	3	25	—	30,000	—	1,200
88	100	100	107	?	100	N/A	125,000	800	2,400
6	N/A	N/A	N/A	N/A	6	100,000	150,000	N/A	1,400
70	78	85	90	10	85	N/A	75,000	N/A	2,400
32	44	44	46	?	38	—	100,000	—	2,200
20	26	25	25	—	25	—	60,000	—	1,500/4,000
23	17	20	17	0	17	80,000	80,000	600	1,900
1	2	2	3	1–2	2	—	95,000	—	1,500/1,800

(Continued from page 37)

of store numbers at least, of the largest C-store companies. An analysis of the 10 largest C-store companies shows that only two companies increased their store counts since 1989—a total increase of only 56 stores—while five companies closed or disposed of a total of 1,392 stores.

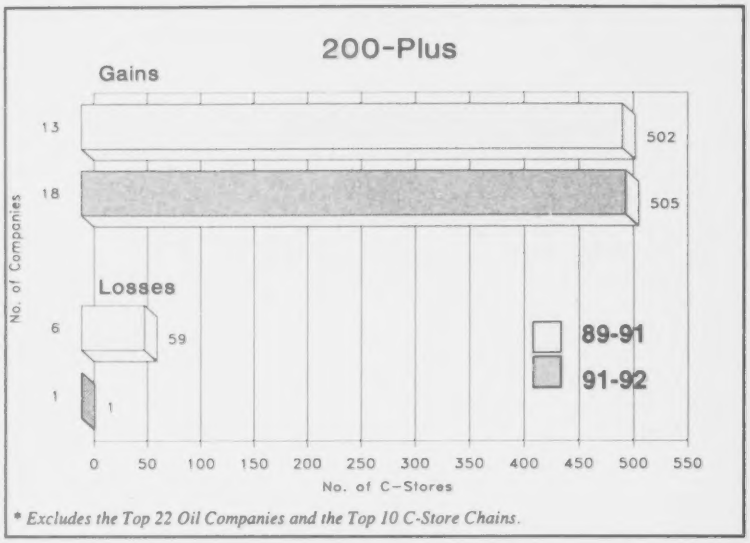
The leading C-store chains don't figure to make up much ground in the next couple of years against their major competitors in the outlet count race. Five of the top 10 companies say they will add a total of 83 stores through the end of 1992, an average gain of 16 stores per company. One company, Circle K, is planning to cut loose an additional 259 stores during the same period.

Does this mean the oil companies are winning the battle for control of the convenience store market?

There's no question that majors, independent gasoline retailers and petroleum marketers have made big inroads into the traditional C-store business. Based on the data reported to *NPN*, that growth trend shows every sign of continuing.

However, the traditionals are seasoned warriors in this highly competitive retail market. They have too much experience and expertise in store operations, distribution, merchandising and all of the other C-store arts to simply fold up their tents and steal away. Companies like NCS, Casey's, Wawa and many others continue to pioneer new concepts and retail strategies, taking the lead in niche marketing by adapting their product and service offerings to appeal to their local customer bases.

In the past 20 years, C-store firms have also become significant players in the gasoline market. For all its troubles, Southland remains one of the largest independent gasoline marketers in the United States, with estimated annual retail sales of about 1.2-billion gal. of gasoline. Another portent for the future: Practically all new C-store being built by traditional chains today have gasoline facilities.



** Excludes the Top 22 Oil Companies and the Top 10 C-Store Chains.*

C-STORE COMPARISON: TOP 10 MAJORS & C-STORE CHAINS

Top 10 Oil Companies

(Direct-supplied outlets only)

Company	1989 Total	1990 Total	1991 Current	1991 Projected	1992 Additions	Estimated Marketer-Supplied Outlets
Amoco	1,200	1,902	1,847	N/A	N/A	4,000
Emro	1,600	1,668	1,668	N/A	N/A	—
Texaco*	N/A	N/A	1,371	N/A	N/A	5,447
Mobil	800	N/A	1,167	1,207	N/A	N/A
Chevron	N/A	1,030	1,030	1,080	50	2,900
Clark	N/A	N/A	905	N/A	NA/	—
BPAmerica	700	750	800	825	35	N/A
Sun	620	510	786	N/A	N/A	941**
Diamond Shamrock	617	680	763	N/A	N/A	1,000
Arco	720	731	752	N/A	N/A	—

* Combined totals for Star Enterprise and Texaco Refining and Marketing.
** Does not include Atlantic Division Marketer-Supplied Outlets.

Top 10 C-Store Companies

Company	1989 Total	1990 Total	1991 Current	1991 Projected	1991 Additions
Southland	7,097	6,190	5,943	N/A	0
Circle K	4,664	4,783	3,859	3,600	0
Dairy Mart	N/A	1,189	1,189	1,170	20
Cumberland Farms	1,075	1,100	1,118	N/A	N/A
Silcorp	1,130	999	999	N/A	N/A
NCS	1,099	1,091	989	989	0
Casey's	732	769	781	800	30
Kampgrounds	643	650	650	656	15
Little Chef	560	560	560	570	N/A
The Pantry	N/A	N/A	448	450	0

Convenience Store Outlets

Company	Number of Stores	Number of States Where Stores Are Located	New England						Middle Atlantic				
			ME	NH	VT	MA	RI	CT	NY	NJ	PA	DE	MD
ABC Discount Stores	48	1	—	—	—	—	—	—	—	—	—	—	—
Acme Petroleum Fuel Co., Inc.	76	2	—	—	—	—	—	—	—	—	—	—	—
Adens Minit Markets	39	3	—	—	—	—	—	—	—	—	—	—	—
Aldin Associates	31	1	—	—	—	—	—	31	—	—	—	—	—
Allen Stop N Shops Inc.	55	2	—	—	—	—	—	—	—	—	—	—	—
Allsup's Convenience Stores, Inc.	305	3	—	—	—	—	—	—	—	—	—	—	—
Amerada Hess Co.	127	5	—	—	—	—	—	—	30	40	13	—	—
American Accessories Inc.	34	2	—	—	—	—	—	—	—	—	—	—	—
American Personnel Service	64	6	—	—	—	—	—	—	—	—	—	—	—
Amoco Oil Co.	1,847	27	—	—	—	—	—	17	137	14	21	3	30
Arco Products Co.	752	5	—	—	—	—	—	—	—	—	—	—	—
Arkansas Valley Petroleum Corp.	15	2	—	—	—	—	—	—	—	—	—	—	—
Ashland Oil Inc.	662	17	—	—	—	—	—	—	—	—	5	—	—
Atlas Oil Co.	18	2	1	—	—	—	—	17	—	—	—	—	—
Aztex Enterprises	21	1	—	—	—	—	—	—	—	—	—	—	—
B & B Cash Grocery Stores	33	1	—	—	—	—	—	—	—	—	—	—	—
Baron Oil Co.	24	1	—	—	—	—	—	—	—	—	—	—	—
Beard Oil Co.	6	1	—	—	—	—	—	—	—	—	—	—	—
Bearden Oil Co.	11	1	—	—	—	—	—	—	—	—	—	—	—
Beck Suppliers	2	1	—	—	—	—	—	—	—	—	—	—	—
Bedford Valley Petroleum Corp.	6	3	—	—	—	—	—	—	—	—	2	—	3
Bell Fuels, Inc.	9	1	—	—	—	—	—	—	—	—	—	—	—
Berwick Bay Oil Co. Inc.	40	2	—	—	—	—	—	—	—	—	—	—	—
Best Oil Co.	19	2	—	—	—	—	—	—	—	—	X	—	—
Big Apple Food Stores	43	2	40	3	—	—	—	—	—	—	—	—	—
Bi-Rite Petroleum, Inc.	3	1	—	—	—	—	—	—	—	—	—	—	—
Blaze Oil Co.	5	1	—	—	—	—	—	—	—	—	—	—	—
Boardman Petroleum Inc.	50	5	—	—	—	—	—	—	—	—	—	—	—
Bosselman's Pump & Pantry	34	1	—	—	—	—	—	—	—	—	—	—	—
BP America, Inc.	800	15	—	—	—	—	—	—	—	—	60	—	—
Bradley, Inc.	19	2	—	—	—	—	—	—	—	—	—	—	—
Broken Hill Prop./Pacific Resources	10	1	—	—	—	—	—	—	—	—	—	—	—
Brooks Food Markets	32	1	—	—	—	—	—	—	—	—	—	—	—
C.R. Brown Oil Co.	19	3	—	—	—	—	—	—	—	—	—	—	—
Browning Oil Co.	13	1	—	—	—	—	—	—	—	—	—	—	—
Burgess Marketing Inc.	50	1	—	—	—	—	—	—	—	—	—	—	—
Bursaw Oil Corp.	8	1	—	—	—	8	—	—	—	—	—	—	—
By-Lo Oil Co.	15	1	—	—	—	—	—	—	—	—	—	—	—
Callahan Oil Co.	21	6	—	3	2	3	1	9	3	—	—	—	—
Camp Oil Co.	45	9	—	—	—	—	—	—	—	—	—	—	—
Campbell Oil Co.	39	1	—	—	—	—	—	—	—	—	—	—	—
Cannon Oil Co.	16	3	—	—	—	—	—	—	—	—	—	—	—
Casey's General Stores, Inc.	781	8	—	—	—	—	—	—	—	—	—	—	—
Cel Oil Products Corp.	7	1	—	—	—	—	—	—	—	—	—	—	—
CENEX Petroleum, Inc.	309	12	—	—	—	—	—	—	—	—	—	—	—
Centennial Liquor Stores	9	1	—	—	—	—	—	—	—	—	—	—	—
Center Independent Oil Co.	5	1	—	—	—	—	—	—	—	—	—	5	—
Certified Oil Co.	18	1	—	—	—	—	—	—	—	—	—	—	—
CF Marts of Pennsylvania	27	1	—	—	—	—	—	—	—	—	27	—	—
CFM Development Corp.	29	2	—	—	—	—	—	—	—	—	—	—	—
Chapman, Inc.	15	1	—	—	—	—	—	—	—	—	—	—	—
Chevron USA, Inc.	1,030	25	—	—	—	—	—	—	—	—	—	—	7
Chico Dairy, Inc.	39	4	—	—	—	—	—	—	—	—	8	—	2
CHR Corp.	51	1	—	—	—	—	—	—	—	—	51	—	—
Christy's Markets, Inc.	134	4	1	10	—	121	2	—	—	—	—	—	—
Circle C Food Stores	30	1	—	—	—	—	—	—	—	—	—	—	—
The Circle K Corp.	3,859	32	2	10	—	45	—	6	—	—	—	—	—
Citgo Petroleum Corp.	15	2	—	—	—	—	—	—	—	—	—	—	—
Clark Oil & Refining Corp.	905	12	—	—	—	—	—	—	—	—	X	—	—
Clipper Petroleum, Inc.	19	1	—	—	—	—	—	—	—	—	—	—	—
Cloud Enterprises, Inc.	29	1	—	—	—	—	—	—	—	—	—	—	—
Coastal Refining and Marketing	572	28	X	—	—	—	—	—	—	X	X	—	X
CoCo Marts, Inc.	17	3	—	7	8	—	—	—	2	—	—	—	—
CoGo's Co.	65	1	—	—	—	—	—	—	—	—	65	—	—
Colonial Oil Industries, Inc.	7	3	—	—	—	—	—	—	—	—	—	—	—
Como Oil Co.	15	2	—	—	—	—	—	—	—	—	—	—	—
Conoco, Inc.	476	22	—	—	—	—	—	—	—	—	—	2	—
Consumers Gasoline Stations, Inc.	45	3	—	—	—	—	—	—	—	—	—	—	—
Con Sun Food Industries	36	1	—	—	—	—	—	—	—	—	—	—	—
Contemporary Industries Corp.	115	7	—	—	—	—	—	—	—	—	—	—	—
Convenience Marketers Inc.	23	2	—	—	—	—	—	—	—	—	—	—	—
Convenient Food Mart	479	16	—	—	—	—	—	—	79	—	26	—	4

X = Exact number unknown, but company operates stores in the state.

in the United States

South Atlantic							East North Central					East South Central				West North			
DC	NC	SC	FL	GA	VA	WV	OH	IN	IL	MI	WI	KY	TN	AL	MS	MN	IA	MO	ND
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	59	17	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	1	37	—	—	—	—	—	—	—	—	—	1	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	14	30	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	4	30	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
14	19	9	347	100	58	—	—	74	247	148	62	—	32	—	—	123	71	96	24
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1	—
—	—	—	41	—	—	50	118	7	20	7	83	93	—	—	—	188	12	3	3
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	21	—	—	—	—	—	—
—	—	—	33	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	24	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	11	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	2	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	1	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	9	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	32	—	—	—	—	—
—	—	—	—	—	—	—	X	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	3	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	7	17	1	21	4	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	55	40	85	50	20	10	400	—	—	—	—	30	40	30	5	—	—	—	—
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—	X	X	X	X	X	X	—	X	X	—	—	X	X	X	X	X	X	X	—
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C 4680-1 (1)

Central			West South Central				Mountain								Pacific				
SD	NE	KS	AR	LA	OK	TX	MT	ID	WY	CO	NM	AZ	UT	NV	WA	OR	CA	AK	HI
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—	—	10	24	264	145	615	34	61	—	57	75	648	52	21	49	40	414	—	7
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X	X	X	X	X	X	X	—	—	X	—	—	X	—	—	—	—	—	—	—
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—	—	—	—	—	10	44	—	2	4	80	—	—	8	—	3	—	—	—	—
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20	45	—	—	—	—	—	1	—	23	—	—	—	—	—	—	—	—	—	—
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—	15	2	—	—	1	—	—	—	—	—	—	—	2	—	—	—	2	—	—

Convenience Store Outlets

Company	Number of Stores	Number of States Where Stores Are Located	New England						Middle Atlantic				
			ME	NH	VT	MA	RI	CT	NY	NJ	PA	DE	MD
Convenient Petroleum Corp.	9	1	—	—	—	—	—	9	—	—	—	—	—
Country Cupboard Food Stores, Inc.	41	1	—	—	—	—	—	—	—	—	—	—	—
Country Fair, Inc.	50	3	—	—	—	—	—	—	X	—	X	—	—
Cox Oil Co.	24	1	—	—	—	—	—	—	—	—	—	—	—
Cracker Barrel Stores, Inc.	61	1	—	—	—	—	—	—	—	—	—	—	—
Crown Central Petroleum Corp.	564	9	—	—	—	—	—	—	—	—	2	—	97
Crown Oil Co.	26	3	—	—	—	—	—	—	—	—	—	—	—
Crystal Flash Petroleum	24	1	—	—	—	—	—	—	—	—	—	—	—
Cumberland Farms, Inc.	1,118	11	47	57	24	283	90	93	143	117	67	13	—
Curt's Oil Co., Inc.	13	3	—	—	—	—	—	—	—	—	—	—	—
Curtis Parker Oil Co. Inc.	4	1	—	—	—	—	—	—	—	—	—	—	—
Dairy Mart Convenience Stores	1,189	11	—	—	—	88	40	76	41	—	47	—	—
Davis Co., Inc.	20	1	—	—	—	—	—	—	—	—	—	—	—
J.M. Davis Inc.	19	1	—	—	—	—	—	—	—	—	—	—	—
Day & Night Food Stores, Inc.	18	1	—	—	—	—	—	—	18	—	—	—	—
Dead River Oil Co.	9	2	7	2	—	—	—	—	—	—	—	—	—
DeBlois Oil Co.	29	2	—	—	—	8	21	—	—	—	—	—	—
Delicatessen Dist. Inc.	20	2	—	—	—	—	—	—	—	—	19	—	—
Delta Sonic Carwash Sytstems	19	2	—	—	—	—	—	—	14	—	—	—	—
Diamond Shamrock	763	3	—	—	—	—	—	—	—	—	—	—	—
Dilmar Oil Co.	22	1	—	—	—	—	—	—	—	—	—	—	—
District Petroleum Products	25	1	—	—	—	—	—	—	—	—	—	—	—
Dixie Oil Co.	68	3	—	—	—	—	—	—	—	—	—	—	—
Down East Energy Co.	22	2	20	2	—	—	—	—	—	—	—	—	—
Drakes Refinery Stations	16	1	—	—	—	—	—	—	—	—	—	—	—
Dunn Oil Co.	6	1	—	—	—	—	—	—	—	—	—	—	—
East Coast Oil Corp.	35	1	—	—	—	—	—	—	—	—	—	—	—
Eastern Fuels, Inc.	43	2	—	—	—	—	—	—	—	—	—	—	—
Emro Marketing Co.	1,668	16	—	—	—	—	—	—	—	—	—	—	—
Englefield Oil Co.	53	2	—	—	—	—	—	—	—	—	—	—	—
Entrepreneur Inc.	159	5	—	—	—	—	—	—	—	—	—	—	—
Erickson Oil Products, Inc.	45	4	—	—	—	—	—	—	—	—	—	—	—
Evans Group	7	2	—	5	2	—	—	—	—	—	—	—	—
Ever Ready Oil Co.	10	1	—	—	—	—	—	—	—	—	—	—	—
Express Lane, Inc.	30	2	—	—	—	—	—	—	—	—	—	—	—
Exxon Co., USA	696	27	—	7	—	13	1	5	8	51	35	8	20
EZ Mart Stores, Inc.	324	5	—	—	—	—	—	—	—	—	—	—	—
E-Z Serve Inc.	55	1	—	—	—	—	—	—	—	—	—	—	—
Farm & Home Oil Co.	5	1	—	—	—	—	—	—	—	—	5	—	—
Farm Fresh, Inc.	17	2	—	—	—	—	—	—	—	—	—	—	—
Farmland Industries	26	9	—	—	—	—	—	—	—	—	—	—	—
Farm Stores, Inc.	228	1	—	—	—	—	—	—	—	—	—	—	—
Fas Mart Convenient Stores	42	1	—	—	—	—	—	—	—	—	—	—	—
Favorite Market	86	3	—	—	—	—	—	—	—	—	—	—	—
Fearless Oil Co.	32	3	—	—	—	—	—	—	—	—	—	—	—
FINA Oil & Chemical Co.	148	7	—	—	—	—	—	—	—	—	—	—	—
FKG Oil Co.	51	6	—	—	—	—	—	—	—	—	—	—	—
Flash Foods, Inc.	94	2	—	—	—	—	—	—	—	—	—	—	—
Fleming Petroleum, Inc.	4	1	—	—	—	—	—	—	—	—	—	—	—
Fleet Oil Co.	13	2	—	—	—	—	—	—	—	—	—	—	—
Flying J, Inc.	35	8	—	—	—	—	—	—	—	—	—	—	—
Food N Fuel Inc.	4	1	—	—	—	—	—	—	—	—	—	—	—
Food Spot Management	40	1	—	—	—	—	—	—	—	—	—	—	—
Foster Oil Co.	19	1	—	—	—	—	—	—	—	—	—	—	—
Four Star Service Stations, Inc.	10	1	—	—	—	—	—	—	—	—	—	—	—
Fresh Way Food Stores	22	1	—	—	—	—	—	—	—	—	—	—	—
H.N. Funkhouser & Co.	11	1	—	—	—	—	—	—	—	—	—	—	—
Garb Co. Inc.	159	4	—	—	—	—	—	—	—	—	—	—	—
Gas America Services, Inc.	40	2	—	—	—	—	—	—	—	—	—	—	—
Gasco Gasoline, Inc.	11	1	—	—	—	—	—	—	—	—	—	—	—
Gas Mart	11	1	—	—	—	—	—	—	—	—	—	—	—
Gas N Shop Inc.	40	2	—	—	—	—	—	—	—	—	—	—	—
Gate Marketing	128	9	—	—	—	—	—	—	—	—	—	—	—
General Oil	31	1	—	—	—	—	—	—	—	—	—	—	—
Getty Petroleum Corp.	561	10	46	28	22	40	3	32	153	31	142	—	—
Giant Industries, Inc.	44	3	—	—	—	—	—	—	—	—	—	—	—
Golden Gallon, Inc.	105	2	—	—	—	—	—	—	—	—	—	—	—
Golden Pantry Food Stores	97	2	—	—	—	—	—	—	—	—	—	—	—
Golub Corp.	5	1	—	—	—	—	—	—	5	—	—	—	—
Go-Mart, Inc.	64	3	—	—	—	—	—	—	—	—	—	—	—
Good Time Stores	41	1	—	—	—	—	—	—	—	—	—	—	—
Gresham Petroleum, Inc.	28	2	—	—	—	—	—	—	—	—	—	—	—
Gull Industries Inc.	32	3	—	—	—	—	—	—	—	—	—	—	—
Guttman Oil Co.	27	1	—	—	—	—	—	—	—	—	27	—	—
Hallum Oil Co.	11	1	—	—	—	—	—	—	—	—	—	—	—

in the United States

	South Atlantic						East North Central					East South Central				West North			
D	NC	SC	FL	GA	VA	WV	OH	IN	IL	MI	WI	KY	TN	AL	MS	MN	IA	MO	ND
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
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—	131	130	21	85	53	1	—	—		—	—	—	—	44	—	—	—	—	—
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—	38	80	89	89	—	4	449	303	150	268	58	62	16	13	22	—	—	—	—
—	—	—	—	—	—	51	2	—	—	—	—	—	—	—	—	—	—	—	—
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C.4680-1 (2)

Central			West South Central				Mountain								Pacific				
SD	NE	KS	AR	LA	OK	TX	MT	ID	WY	CO	NM	AZ	UT	NV	WA	OR	CA	AK	HI
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—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

Convenience Store Outlets

Company	Number of Stores	Number of States Where Stores Are Located	New England						Middle Atlantic				
			ME	NH	VT	MA	RI	CT	NY	NJ	PA	DE	MD
Handee Marts Food Stores	18	1	—	—	—	—	—	—	—	—	—	—	—
Handy Andy Pantries	24	2	—	—	—	—	—	—	—	—	—	—	—
Happy Food Stores, Inc.	20	1	—	—	—	—	—	—	—	—	—	—	—
Harper Oil Co.	22	1	—	—	—	—	—	—	—	—	—	—	—
Harris Oil Co.	2	1	—	—	—	—	—	—	—	—	—	—	—
Hawaiian Independent Refinery, Inc.	29	1	—	—	—	—	—	—	—	—	—	—	—
Herdrich Petroleum Corp.	17	1	—	—	—	—	—	—	—	—	—	—	—
Herkimer Petroleum Products	23	1	—	—	—	—	—	—	23	—	—	—	—
Herndon Oil Co.	20	2	—	—	—	—	—	—	—	—	—	—	—
Herndon Oil Corp.	36	3	—	—	—	—	—	—	—	—	—	—	—
Highs Dairy Stores	192	5	—	—	—	—	—	—	—	—	11	—	90
Angus I. Hines, Inc.	32	3	—	—	—	—	—	—	—	—	—	—	—
Holiday Oil Co.	24	1	—	—	24	—	—	—	—	—	—	—	—
Holiday Station Stores Inc.	242	7	—	—	—	—	—	—	—	—	—	—	—
Holland Oil Co.	31	1	—	—	—	—	—	—	—	—	—	—	—
Horkey Oil Co., Inc.	21	1	—	—	—	—	—	—	—	—	—	—	—
Howdy Doody Inc.	20	1	—	—	—	—	—	—	—	—	—	—	—
Hudson Oil Co.	11	2	—	—	—	—	—	—	—	—	—	—	—
Huges Energy, Inc.	10	1	—	—	—	—	—	—	—	—	—	—	—
Hull Oil Co.	6	1	—	—	—	—	—	—	—	—	—	—	—
Huntley Jiffy Stores	480	2	—	—	—	—	—	—	—	—	—	—	—
Imperial Oil Co.	38	2	—	—	—	—	—	—	—	—	—	—	—
Independent Retailers Assn.	38	1	—	—	—	—	—	—	—	—	—	—	—
J & L Oil Co.	29	3	—	—	—	—	—	—	—	—	—	—	—
Jaco Oil Co.	35	2	—	—	—	—	—	—	—	—	—	—	—
Jacobus Petroleum Products, Inc.	12	1	—	—	—	—	—	—	—	—	—	—	—
JFM, Inc.	450	18	—	—	—	—	—	—	—	—	—	—	—
Jiffy Food Stores	20	1	—	—	—	—	—	—	—	—	—	—	—
Jiffy Marts	17	3	—	—	8	8	—	—	—	1	—	—	—
Jim Dandy Markets, Inc.	32	1	—	—	—	—	—	—	—	—	—	—	—
Johnny's Quik Food	23	1	—	—	—	—	—	—	—	—	—	—	—
Johnson Oil Co.	62	2	—	—	—	—	—	—	—	—	—	—	—
R.L. Jordan Oil Co. of No. Carolina, Inc.	36	3	—	—	—	—	—	—	—	—	—	—	—
Junior Food Stores	104	2	—	—	—	—	—	—	—	—	—	—	—
Jr. Food Stores, Inc.	54	2	—	—	—	—	—	—	—	—	—	—	—
Kaibab Industries	18	1	—	—	—	—	—	—	—	—	—	—	—
Kampgrounds of America, Inc.	650	47	3	4	1	5	—	—	20	1	14	—	1
Kangaroo, Inc.	32	1	—	—	—	—	—	—	—	—	—	—	—
L. Keller Oil Properties, Inc.	42	1	—	—	—	—	—	—	—	—	—	—	—
Kelley Williamson Co.	21	1	—	—	—	—	—	—	—	—	—	—	—
Kenny's Markets	24	1	—	—	—	—	—	—	—	—	—	—	—
Kent Distributors, Inc.	17	1	—	—	—	—	—	—	—	—	—	—	—
Kenyon Oil Co.	127	7	10	8	—	29	21	32	24	—	3	—	—
Kerr-McGee Refining Corp.	1,043	19	—	—	—	—	—	—	—	—	—	—	—
Kimber Petroleum Corp.	4	1	—	—	—	—	—	—	—	4	—	—	—
King & King Enterprises, Inc.	30	3	—	—	—	—	—	—	—	—	—	—	—
Kocolene Oil Corp.	20	2	—	—	—	—	—	—	—	—	—	—	—
Krause Gentle Corp.	140	6	—	—	—	—	—	—	—	—	—	—	—
Krist Oil Co.	35	2	—	—	—	—	—	—	—	—	—	—	—
Kwickie Food Stores, Inc.	52	1	—	—	—	—	—	—	—	—	—	—	—
Kwik King Food Stores	54	1	—	—	—	—	—	—	—	—	—	—	—
Kwik Sak	33	1	—	—	—	—	—	—	—	—	—	—	—
Kwik Shop, Inc.	209	5	—	—	—	—	—	—	—	—	—	—	—
Kwik Trip, Inc.	219	3	—	—	—	—	—	—	—	—	—	—	—
Kwik Way, Inc.	21	1	—	—	—	—	—	—	—	—	—	—	—
Landhope Farms	18	3	—	—	—	3	—	—	—	—	12	3	—
Lassus Bros. Oil Inc.	20	1	—	—	—	—	—	—	—	—	—	—	—
LDD Corp.	8	1	—	—	—	—	—	—	—	8	—	—	—
Ledbetter Oil Co.	15	1	—	—	—	—	—	—	—	—	—	—	—
Carols R. Leffler	40	1	—	—	—	—	—	—	—	—	40	—	—
H.C. Lewis Oil Co.	5	1	—	—	—	—	—	—	—	—	—	—	—
Lindner Dairy Centers	9	1	—	—	—	—	—	—	—	—	—	—	—
Lipscomb Oil Co., Inc.	16	2	—	—	—	—	—	—	—	—	—	—	—
Little Chef Stores	560	2	—	—	—	—	—	—	—	—	—	—	—
Loaf N Jug	69	3	—	—	—	—	—	—	—	—	—	—	—
Lowes Food Stores Inc.	21	1	—	—	—	—	—	—	—	—	—	—	—
The Lyden Co.	55	1	—	—	—	—	—	—	—	—	—	—	—
Lykins Oil Co.	9	2	—	—	—	—	—	—	—	—	—	—	—
Mapco Petroleum, Inc.	320	10	—	—	—	—	—	—	—	—	—	—	—
Marathon Oil Co.	408	9	—	—	—	—	—	—	—	—	X	—	—
Maritime Energy Co.	5	1	5	—	—	—	—	—	—	—	—	—	—
Marsh Village Pantries, Inc.	170	2	—	—	—	—	—	—	—	—	—	—	—
Martin & Bayley Inc.	96	5	—	—	—	—	—	—	—	—	—	—	—
Martin Oil Co.	18	1	—	—	—	—	—	—	—	—	18	—	—
Martin Oil Marketing, Ltd.	43	2	—	—	—	—	—	—	—	—	—	—	—

in the United States

South Atlantic							East North Central					East South Central				West North			
DC	NC	SC	FL	GA	VA	WV	OH	IN	IL	MI	WI	KY	TN	AL	MS	MN	IA	MO	ND
—	—	18	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
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2	10	10	56	9	16	1	12	13	10	16	8	12	27	3	4	16	5	19	4
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C41680-1 (3)

Central			West South Central				Mountain								Pacific				
SD	NE	KS	AR	LA	OK	TX	MT	ID	WY	CO	NM	AZ	UT	NV	WA	OR	CA	AK	HI
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Convenience Store Outlets

Company	Number of Stores	Number of States Where Stores Are Located	New England						Middle Atlantic				
			ME	NH	VT	MA	RI	CT	NY	NJ	PA	DE	MD
Maverick Markets, Inc.	110	1	—	—	—	—	—	—	—	—	—	—	—
Maveric Mini Marts	23	1	—	—	—	—	—	—	—	—	—	—	—
Maverik Country Stores, Inc.	112	8	—	—	—	—	—	—	—	—	—	—	—
May-Slade Oil Co.	7	1	—	—	—	—	—	—	—	—	—	—	—
McDowell Oil Service, Inc.	28	1	—	—	—	—	—	—	—	—	—	—	—
McGuire Food Marts, Inc.	18	1	—	—	—	—	—	—	—	—	—	—	—
McLeieer Oil Service, Inc.	3	1	—	—	—	—	—	—	—	—	—	—	—
Mercer's Kwik Stop Food Stores	60	2	—	—	1	—	—	—	59	—	—	—	—
Merritt Truax, Inc.	5	1	—	—	—	—	—	—	—	—	—	—	—
Metzger Dairies, Inc. (Mr. M)	47	1	—	—	—	—	—	—	—	—	—	—	—
Mickey's Enterprises, Inc.	16	1	—	—	—	—	—	—	—	—	—	—	—
Mid-Continent Systems, Inc.	26	2	—	—	—	—	—	—	—	—	—	—	—
Mid-Missouri Oil Co.	6	1	—	—	—	—	—	—	—	—	—	—	—
Mid South Sales, Inc.	14	1	—	—	—	—	—	—	—	—	—	—	—
Midstate Oil Co.	64	1	—	—	—	—	—	—	—	—	—	—	—
Mid-States Petroleum	39	3	—	—	—	—	—	—	—	—	—	—	—
Mid-West Petroleum Inc.	45	3	—	—	—	—	—	—	—	—	—	—	—
Midwest Industrial Fuels	30	2	—	—	—	—	—	—	—	—	—	—	—
Midwest Petroleum Co.	56	2	—	—	—	—	—	—	—	—	—	—	—
Miller & Holmes, Inc.	24	6	—	—	—	—	—	—	—	—	—	—	—
Miller Enterprises Inc.	128	1	—	—	—	—	—	—	—	—	—	—	—
Miller Oil Co.	41	2	—	—	—	—	—	—	—	—	—	—	—
Mini Mart Inc.	117	6	—	—	—	—	—	—	—	—	—	—	—
Mini Marts	30	1	—	—	—	—	—	—	—	—	30	—	—
Minit Mart Foods, Inc.	98	2	—	—	—	—	—	—	—	—	—	—	—
Minit Mart, L.P.	50	2	—	—	—	—	—	—	—	—	—	—	—
Minit Stop, Inc.	10	1	—	—	—	—	—	—	—	—	—	—	—
Mobil Corp.	1,167	19	8	15	2	58	9	36	118	45	37	—	16
Modern Oil Co., Inc.	26	1	—	—	—	—	—	—	—	—	—	—	—
Mooney Oil Corp.	19	1	—	—	—	—	—	—	—	—	—	—	—
Moore Petroleum	3	1	—	—	—	—	—	—	—	—	—	—	—
Mountain Empire Oil Co.	32	3	—	—	—	—	—	—	—	—	—	—	—
Moyle Petroleum Co.	30	1	—	—	—	—	—	—	—	—	—	—	—
Mr. Zip Convenience Stores, Inc.	50	3	—	—	—	—	—	—	—	—	—	—	—
Munro Petroleum & Terminal Corp.	11	1	—	—	—	—	—	—	—	—	—	—	—
Murphy Oil USA, Inc.	156	12	—	—	—	—	—	—	—	—	—	—	—
Musket Corp.	127	6	—	—	—	—	—	—	—	—	—	—	—
National Convenience Stores, Inc.	989	3	—	—	—	—	—	—	—	—	—	—	—
National Oil & Gas, Inc.	40	2	—	—	—	—	—	—	—	—	—	—	—
Neal, Inc.	24	1	—	—	—	—	—	—	—	—	—	—	—
Nella Oil Co.	24	2	—	—	—	—	—	—	—	—	—	—	—
Nelson's Oil & Gas, Inc.	7	3	—	—	—	—	—	—	—	—	—	—	—
Nice N Easy Grocery Shoppes, Inc.	85	1	—	—	—	—	—	—	85	—	—	—	—
Northville Industries Corp.	6	1	—	—	—	—	—	—	6	—	—	—	—
Nugget Oil, Inc.	46	1	—	—	—	—	—	—	—	—	—	—	—
Omega Oil Co.	58	2	—	—	—	—	—	—	—	—	—	—	—
Open Pantry Food Marts	59	2	—	—	—	—	—	—	—	—	—	—	—
Orloski's Service Stations, Inc.	34	1	—	—	—	—	—	—	—	—	34	—	—
Otto Energy, Inc.	6	1	—	—	—	—	—	—	—	—	—	—	—
Pacific Petroleum Corp.	4	1	—	—	—	—	—	—	—	—	—	—	—
Pack & Sack Food Centers, Inc.	46	2	—	—	—	—	—	—	—	—	—	—	—
The Pantry Inc.	448	4	—	—	—	—	—	—	—	—	—	—	—
The Pantry Store Inc.	28	2	—	—	—	—	—	—	—	—	—	—	—
Parker Oil Co., Inc.	30	2	—	—	—	—	—	—	—	—	—	—	—
Parman Oil Co.	19	1	—	—	—	—	—	—	—	—	—	—	—
Patterson Oil Co., Inc.	9	1	—	—	—	—	—	9	—	—	—	—	—
Pay Less Oil Co.	21	1	—	—	—	—	—	—	—	—	—	—	—
Pay N Save Inc.	14	2	—	—	—	—	—	—	—	—	—	—	—
PDQ Food Stores, Inc.	87	4	—	—	—	—	—	—	—	—	—	—	—
Petroleum Marketers, Inc.	50	2	—	—	—	—	—	—	—	—	—	—	—
Petroleum Marketing Co.	97	6	—	—	—	—	—	—	—	—	—	—	—
Petroleum Sales & Service	4	1	—	—	—	—	—	—	4	—	—	—	—
Petroleum World, Inc.	34	2	—	—	—	—	—	—	—	—	—	—	—
Phillips 66 Co.	213	N/A	—	—	—	—	—	—	—	—	—	—	—
Piasa Motor Fuels, Inc.	8	2	—	—	—	—	—	—	—	—	—	—	—
Pick Kwik Food Stores, Inc.	89	1	—	—	—	—	—	—	—	—	—	—	—
Pilot Corp.	88	22	—	—	—	—	—	—	—	—	—	—	—
Pipeline Oil Sales	30	1	—	—	—	—	—	—	—	—	—	—	—
Plaid Pantries, Inc.	105	2	—	—	—	—	—	—	—	—	—	—	—
Poole Oil Co.	5	2	—	—	—	—	—	—	—	—	—	—	—
Presta Oil Inc.	19	1	—	—	—	—	—	—	—	—	—	—	—
Presto Food Stores, Inc.	63	1	—	—	—	—	—	—	—	—	—	—	—
Purity Oil Co.	13	1	—	—	—	—	—	—	—	—	—	—	—
Q-Mart Food Stores of America	19	1	—	—	—	—	—	—	—	—	—	—	—
Q Midwest	6	1	—	—	—	—	—	—	—	—	—	—	—

in the United States

South Atlantic							East North Central					East South Central				West North			
DC	NC	SC	FL	GA	VA	WV	OH	IN	IL	MI	WI	KY	TN	AL	MS	MN	IA	MO	ND
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C 4680-1 (4)

Central			West South Central				Mountain								Pacific				
SD	NE	KS	AR	LA	OK	TX	MT	ID	WY	CO	NM	AZ	UT	NV	WA	OR	CA	AK	HI
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Convenience Store Outlets

Company	Number of Stores	Number of States Where Stores Are Located	New England						Middle Atlantic				
			ME	NH	VT	MA	RI	CT	NY	NJ	PA	DE	MD
Quarles Petroleum	15	1	—	—	—	—	—	—	—	—	—	—	—
Quality Oil Co. Inc., Ltd. Partnership	28	2	—	—	—	—	—	—	—	—	—	—	—
Quality Petroleum Corp.	50	2	—	—	—	—	—	—	—	—	—	—	—
Quick Chek Food Stores, Inc.	95	1	—	—	—	—	—	—	—	95	—	—	—
Quick 'N Easy Stores, Inc.	18	1	—	—	—	—	—	—	—	—	—	—	—
Quick-Sav Food Stores	29	1	—	—	—	—	—	—	—	—	—	—	—
Quick Stop Food Mart, Inc.	80	2	—	—	—	—	—	—	—	—	—	—	—
Quik Mart Stores	4	1	—	—	—	—	—	—	—	—	—	—	—
Quik Mart Stores, Inc.	24	1	—	—	—	—	—	—	—	—	—	—	—
Quik Thrift Food Stores, Inc.	14	1	—	—	—	—	—	—	—	—	—	—	—
QuikTrip Corp.	284	6	—	—	—	—	—	—	—	—	—	—	—
Qwik Korner Deli-Grocery, Inc.	7	1	—	—	—	—	—	—	—	—	—	—	—
Qwik Stop	3	1	—	—	—	—	—	—	—	—	—	—	—
Racetrac Petroleum	259	12	—	—	—	—	—	—	—	—	—	—	—
Rainbo Oil Co.	37	1	—	—	—	—	—	—	—	—	—	—	—
Ram Oil Co.	13	1	—	—	—	—	—	—	—	—	—	—	—
Red Hed Oil Co., Inc.	8	1	—	—	—	—	—	—	—	—	—	—	—
Red Rock Distributing	19	1	—	—	—	—	—	—	—	—	—	—	—
Retail Marketing Co.	97	6	—	—	—	—	—	—	—	—	—	—	—
Rinehart Oil Inc.	6	1	—	—	—	—	—	—	—	—	—	—	—
River Oil Co.	3	1	—	—	—	—	—	—	—	—	—	—	—
F.L. Roberts	24	2	—	—	—	X	—	X	—	—	—	—	—
Robinson Oil Co.	8	1	—	—	—	—	—	—	—	—	—	—	—
Rocky Top Markets, Inc.	25	1	—	—	—	—	—	—	—	—	—	—	—
Russ Day N Nite Markets	14	1	—	—	—	—	—	—	—	—	—	—	—
Russel Petroleum Corp.	17	1	—	—	—	—	—	—	—	—	—	—	—
Sac N Pac Stores	20	1	—	—	—	—	—	—	—	—	—	—	—
Sahara Oil Co., Inc.	8	1	—	—	—	—	—	—	—	—	—	—	—
Santee Oil Co., Inc.	4	1	—	—	—	—	—	—	—	—	—	—	—
Satco	21	1	—	—	—	—	—	—	—	—	—	—	—
Sav A Step Food Marts	26	2	—	—	—	—	—	—	—	—	—	—	—
Sav-A-Stop, Inc.	19	1	—	—	—	—	—	—	—	—	—	—	—
Sav-A-Trip, Inc.	19	2	—	—	—	—	—	—	—	—	—	—	—
Save-X USA, Inc.	10	1	—	—	—	—	—	—	—	—	—	—	—
Savings Station Dodges Store	60	10	—	—	—	—	—	—	—	—	—	—	—
SBR, Inc.	63	2	23	—	—	—	—	—	—	—	—	—	—
Scaff's Inc.	35	1	—	—	—	—	—	—	—	—	—	—	—
SCASCO	10	1	—	—	—	—	—	10	—	—	—	—	—
Schaeffer Oil Inc.	6	2	—	—	—	—	—	—	—	—	—	—	—
Schierl Sales Corp.	23	2	—	—	—	—	—	—	—	—	—	—	—
Schmuckal Oil Co.	18	1	—	—	—	—	—	—	—	—	—	—	—
Carl M. Schultz Inc.	24	1	—	—	—	—	—	—	—	—	—	—	—
Sears Oil Co., Inc.	10	1	—	—	—	—	—	—	10	—	—	—	—
Sessoms Properties	12	1	—	—	—	—	—	—	—	—	—	—	—
Shay Oil Co., Inc.	11	1	—	—	—	—	—	—	—	—	—	—	—
Sheetz, Inc.	160	4	—	—	—	—	—	—	—	—	124	—	21
Sheffield Oil Co.	24	3	—	—	—	—	—	—	—	—	—	—	—
Shell Oil Co.	1,300	41	—	X	—	X	X	X	X	X	X	X	X
Shipley Oil Co.	20-25	1	—	—	—	—	—	—	—	—	X	—	—
Shirtcliff Oil Co.	2	1	—	—	—	—	—	—	—	—	—	—	—
Shop A Snak Food Marts, Inc.	22	1	—	—	—	—	—	—	—	—	—	—	—
Shop Rite, Inc.	42	1	—	—	—	—	—	—	—	—	—	—	—
Short Stop Food Marts	62	1	—	—	—	—	—	—	—	—	—	—	—
SICO	8	2	—	—	—	—	—	—	—	—	7	1	—
Silcorp Ltd.	999*	1	—	—	—	—	—	—	—	—	—	—	—
Sinclair Oil Corp.	300	14	—	—	—	—	—	—	—	—	—	—	—
Sing Oil Co.**	56	?	—	—	—	—	—	—	—	—	—	—	—
Site Oil Co.	50	8	—	—	—	—	—	—	—	—	—	—	—
6-Twelve Convenience Mart Inc.	27	2	—	—	—	—	—	—	—	—	—	—	21
Skinny's, Inc.	49	1	—	—	—	—	—	—	—	—	—	—	—
R.L. Smeltz Oil Co., Inc.	10	1	—	—	—	—	—	—	—	—	—	10	—
Southern Counties Oil Co.	5	1	—	—	—	—	—	—	—	—	—	—	—
Southern Food Park, Inc.	16	1	—	—	—	—	—	—	—	—	—	—	—
Southern Oil Co., Inc.	6	1	—	—	—	—	—	—	—	—	—	—	—
The Southland Corp.	5,943	31	—	8	—	36	10	40	216	221	197	30	315
Spectrum Stores, Inc.	42	2	—	—	—	—	—	—	—	—	—	—	—
The Spencer Co., Inc.	33	1	—	—	—	—	—	—	—	—	—	—	—
Spies Corp.	1	1	—	—	—	—	—	—	—	—	—	—	—
Stallings Oil Co.	41	2	—	—	—	—	—	—	—	—	—	—	—
Star Development Holding	30	1	—	—	—	—	—	—	—	—	—	—	—
Star Enterprises	5,397	26	32	25	15	67	28	80	50	91	219	30	140
Star Oil Co.	4	1	—	—	—	—	—	—	—	—	—	—	—
Sterling Milk Co.	28	2	—	—	—	—	—	—	—	—	—	—	—

* Includes 66 in U.S. and 933 in Canada.

**Bought by Amoco in October 1990.

in the United States

South Atlantic							East North Central					East South Central				West North			
DC	NC	SC	FL	GA	VA	WV	OH	IN	IL	MI	WI	KY	TN	AL	MS	MN	IA	MO	ND
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—	X	X	X	—	X	—	—	—	—	—	—	X	X	X	X	—	—	—	—
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CH690-1 (5)

Central			West South Central				Mountain								Pacific				
SD	NE	KS	AR	LA	OK	TX	MT	ID	WY	CO	NM	AZ	UT	NV	WA	OR	CA	AK	HI
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—	—	27	—	—	20	584	—	19	—	268	22	112	158	187	293	147	1,283	—	—
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—	—	—	37	328	5	1,259	—	—	—	—	—	—	—	—	—	—	—	—	—
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Convenience Store Outlets

Company	Number of Stores	Number of States Where Stores Are Located	New England						Middle Atlantic				
			ME	NH	VT	MA	RI	CT	NY	NJ	PA	DE	MD
Steuart Petroleum Co.	63	7	—	—	—	—	—	—	—	—	—	—	?
Stewart Oil Co. Tri-Star Marketing	39	2	—	—	—	—	—	—	—	—	—	—	—
Stewarts Ice Cream	181	2	—	—	7	—	—	—	174	—	—	—	—
Stop In Food Stores, Inc.	51	2	—	—	—	—	—	—	—	—	—	—	—
Stop-N-Go of Madison, Inc.	47	2	—	—	—	—	—	—	—	—	—	—	—
The Store 24, Inc.	109	5	—	X	—	X	X	X	X	—	—	—	—
Strassburger Enterprises	29	1	—	—	—	—	—	—	—	—	—	—	—
Sugar Creek Stores	103	1	—	—	—	—	—	—	103	—	—	—	—
Sunglo Service, Inc.	24	1	—	—	—	—	—	—	—	—	—	—	—
Sun Refining & Marketing Co.	1,727	27	11	23	9	79	25	72	285	—	297	6	5
Sunny Side Farms	10	1	—	—	—	—	—	10	—	—	—	—	—
Sunshine Jr. Stores, Inc.	296	5	—	—	—	—	—	—	—	—	—	—	—
Suwannee Swifty Stores	212	3	—	—	—	—	—	—	—	—	—	—	—
Sweeney Co., Inc.	6	1	—	—	—	—	—	—	—	—	—	—	—
T & E Oil Co.	9	1	—	—	—	—	—	—	—	—	—	—	—
Target Capital Div.	20	2	—	—	—	—	—	—	—	—	—	—	—
Tattnal Foods, Inc.	26	1	—	—	—	—	—	—	—	—	—	—	—
Taylor Food Marts	112	5	—	—	—	—	—	—	—	—	—	—	—
Taylor Oil Co.	60	2	—	—	—	—	—	—	—	—	—	—	—
Tedeschi's Food Stores	64	2	—	—	—	62	2	—	—	—	—	—	—
Tesoro Petroleum Corp.	39	1	—	—	—	—	—	—	—	—	—	—	—
Texaco	471	14	—	—	—	—	—	—	—	—	—	—	—
TFM Co.	19	3	—	—	—	—	—	—	—	—	—	—	—
Thomas Oil Co.	5	1	—	—	—	—	—	—	—	—	—	—	—
Thornhill Oil Co., Inc.	16	1	—	—	—	—	—	—	—	—	—	—	—
Thornton Oil Corp.	106	6	—	—	—	—	—	4	—	—	—	—	—
Thrifty Oil Co.	151	1	—	—	—	—	—	—	—	—	—	—	—
Thriftway Marketing Corp.	71	4	—	—	—	—	—	—	—	—	—	—	—
Time Oil Co.	169	5	—	—	—	—	—	—	—	—	—	—	—
Time Saver Stores, Inc.	133	1	—	—	—	—	—	—	—	—	—	—	—
TOC Retail Inc. dba Majik Market Mgmt.	389	11	—	—	—	—	—	—	—	—	—	—	—
Tom Thumb Food Markets, Inc.	104	2	—	—	—	—	—	—	—	—	—	—	—
Tooley Oil Co.	6	1	—	—	—	—	—	—	—	—	—	—	—
Total Petroleum	627	18	—	—	—	—	—	—	—	—	—	—	—
Town & Country Food Marts	66	4	—	—	—	—	—	—	—	—	—	—	—
Town & Country Food Stores	31	1	—	—	—	—	—	—	—	—	—	—	—
Town Pump	61	1	—	—	—	—	—	—	—	—	—	—	—
Town Star Food Stores, Inc.	31	1	—	—	—	—	—	—	—	—	—	—	—
Trejo Oil Co.	25	1	—	—	—	—	—	—	—	—	—	—	—
Tri-Valley Distributors, Inc.	40	6	—	—	—	—	—	—	—	—	—	—	—
Triton, Inc.	21	3	—	—	—	—	—	—	—	—	—	—	—
Twin Lakes Petroleum Corp.	7	1	—	—	—	—	—	—	—	—	—	—	—
Ultramar, Inc.	202	2	—	—	—	—	—	—	—	—	—	—	—
Ultra Power Corp.	4	1	—	—	—	—	—	—	4	—	—	—	—
Uni-Marts, Inc.	340	5	—	—	—	—	—	—	26	12	296	5	1
United Dairy Farmers	214	3	—	—	—	—	—	—	—	—	—	—	—
United Refining Co. of PA	193	3	—	—	—	—	—	—	—	43	148	—	—
UNOCAL	2,188	13	—	—	—	—	—	—	—	—	—	—	—
U.S.A. Petroleum	29	5	—	—	—	—	—	—	—	—	—	—	—
Venta	44	4	—	—	—	—	—	—	—	—	—	—	—
Verona Oil Co., Inc.	24	1	—	—	—	—	—	—	24	—	—	—	—
Vista Marketing Group, Ltd.	6	2	—	—	—	—	—	—	—	—	—	—	—
Waco Oil Co.	13	2	—	—	—	—	—	—	—	—	—	—	—
Wades Foods, Inc.	21	1	—	—	—	—	—	—	—	—	—	—	—
Wake Up Oil Co., Inc.	5	1	—	—	—	—	—	—	—	—	—	—	—
Walters Dimmick Petroleum	37	3	—	—	—	—	—	—	—	—	—	—	—
Warelubco, Inc.	67	5	—	—	—	—	—	—	—	—	—	—	—
Warren Equities, Inc.	127	7	10	8	—	29	21	32	24	—	3	—	—
Warring Oil Co.	27	2	—	—	—	—	—	—	—	—	—	—	—
Wawa, Inc.	485	5	—	—	—	—	—	X	—	X	X	X	X
Webster Oil Co.	4	1	—	—	—	—	—	—	—	—	—	—	—
Weigels Farm Stores	38	1	—	—	—	—	—	—	—	—	—	—	—
Welsh Oil Co.	21	2	—	—	—	—	—	—	—	—	—	—	—
West Lynn Creamery	50	2	—	6	—	44	—	—	—	—	—	—	—
West Star Corp.	9	1	—	—	—	—	—	—	—	—	—	—	—
West Texas Gas Inc.	17	1	—	—	—	—	—	—	—	—	—	—	—
Western Energetics	20	1	—	—	—	—	—	—	—	—	—	—	—
Western Marketing, Inc.	15	2	—	—	—	—	—	—	—	—	—	—	—
Westgate Oil Co.	30	1	—	—	—	—	—	—	—	—	—	—	—
A.T. Williams Oil Co.	100	2	—	—	—	—	—	—	—	—	—	—	—
J.H. Williams Oil Co., Inc.	6	1	—	—	—	—	—	—	—	—	—	—	—
Williamson Oil Co	85	3	—	—	—	—	—	—	—	—	—	—	—
The Willis Group, Inc./Dash In Food Stores	44	3	—	—	—	—	—	—	—	—	—	1	31
Wind River Petroleum	25	1	—	—	—	—	—	—	—	—	—	—	—
Wooten Oil Co.	20	1	—	—	—	—	—	—	—	—	—	—	—

in the United States

South Atlantic							East North Central					East South Central				West North			
DC	NC	SC	FL	GA	VA	WV	OH	IN	IL	MI	WI	KY	TN	AL	MS	MN	IA	MO	ND
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C4680-1 (6)

Central			West South Central				Mountain								Pacific				
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Letters to the Editor

Poetic License

My father recently discovered your publication, and he sent me clippings of your *NPN* logo. Enclosed is a photo of my North Carolina license plate, which should be of some interest. I have used my initials on personalized plates in New York, Massachusetts and now here, too.

Until your publication, the most interesting response to my own *NPN* has come from computer technicians. It seems that the contacts of transistors are usually labeled NPN, though PNP is also possible.

Thank you very much, and I appreciate the good taste shown by the graphics department.

Neil P. Nissenbaum
Jacksonville, NC

Number Crunching

I received the 1991 *NPN Factbook* today and was pleased that Total Petroleum, Inc., was mentioned in several articles: "Twenty Companies Elevate Asset Values with Ten Hitting New Peaks" (p13), "Company Rankings by Marketers with Assets of $1-Billion or More" (p26) and "Shell Retains Title as No. 1 'Gas' Marketer for Fifth Straight Year" (p138).

It was disturbing to discover that Total Petroleum's 1989 and 1990 figures reported for asset base (p13 and p16) were transposed and reflected a decline when assets rose from $1.16-billion in 1989 to $1.25-billion in 1990. In addition, Total Petroleum's fuel volume sales reported (p139) for 1990 were our 1989 sales and the change from 1989 reflected a 7.2% decline. I believe it is important to clarify the data for all readers of the *NPN Factbook*.

Listed below are the correct figures for Total Petroleum:

	1989	1990	% Chng.
Assets	$1.16-Billion	$1.25-Billion	+7.8%
Volumes (gal.)			
All Branded			
Locations	1,778,167,000	1,915,336,000	+7.7

Our corrected share of the market for 1990 is 1.66% and our 15th position would remain unchanged.

Thank you for your prompt and continued cooperation.

Michael N. Eha
Marketing analyst
Total Petroleum, Inc.
Retail Division

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30-34, 36-41